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ABSTRACT

This study examines major issues in, and effective practices for, private funding for elementary and secondary public education in British Columbia. The sources and allocation of funds for school districts and schools were investigated, along with their funding practices. Using data on funds obtained from a representative sampling of 13 districts and 66 schools, along with opinions of administrators and literature relating to the topic, the study revealed the benefits and disadvantages of private funding. Results revealed that schools receive an estimated $14.8 million in private funds. $4.7 million was spent on curricular expenditures, and $5.5 million on extracurricular, and the remainder went to school boards, scholarships, and donations. The study found that private funding at the school level is not cost-effective, that private scholarships exceed those given by the government, and that funds go to a minority of students. On the other hand, private funding not only supplements programs, but enhances community relations and provides learning opportunities for students. The study concludes that government incentives should be established that encourage more private funding at the school district level. (TE)

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PRIVATE FUNDING FOR ELEMENTARY AND SECONDARY PUBLIC EDUCATION IN BRITISH COLUMBIA FOR 1983/84

by

Kirk Salloum

B.A., Simon Fraser University, 1977

A THESIS SUBMITTED IN PARTIAL FULFILLMENT OF
THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF ARTS (EDUCATION)
in the Faculty
of
Education

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Abstract

This study examined the question of private funding for elementary and secondary public education in B.C. for the 1983/84 school year. The sources and allocation of private funds for school districts and schools were investigated, along with their private funding practices. Major issues in private funding in public education were also investigated, as were effective funding practices.

The data on private funds were obtained from 13 school districts and 66 schools(48 elementary, three elementary-secondary, four junior secondary, three senior secondary and eight secondary). In addition, opinions were sought from superintendents and principals from these schools and school districts.

School districts were chosen on the basis of their regional location, enrolment size, and economic, unemployment, and education status. Schools from these school districts were chosen on the basis of enrolment size and grade level.

Results from the purposive sample of 13 school districts and 66 schools were extrapolated to the total population of B.C. school districts and schools. This extrapolation revealed that the B.C. public school system received an estimated $14.8 million in private funds. Schools raised $12.1 million of this amount. An estimated $4.8 million came from student fees and $5.3 million from fund raising activities. A further $0.7 million came from monetary and non-monetary gifts and $1.3 million came from other sources such as profits from vending machines and school sales. School districts raised an estimated $1.0 million from trust funds, foundations, private citizens, and businesses. The remaining $1.7 million came from privately donated school level scholarships.

The results indicated that $4.7 million of the $14.8 million was spent on curricular programs and $5.5 million on extra-curricular programs. A further $1.0 million was turned over to school boards for consumable supplies. An estimated $2.5 million was given out in private scholarships (donated and school raised scholarships) and $1.1 million went to other expenses, donations, or was retained as surplus.

Through the opinions of superintendents and principals a number of benefits as well as dysbenefits of private funding in the public school system were identified.

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CHAPTER 1

THE PROBLEM

Introduction

In these current times of fiscal restraint, declining enrolment, and escalating costs, schools and school districts in British Columbia (Note 1) are finding that public funds are inadequate for financing needed educational programs and services (Note 2). Reduction or elimination of programs is not a means for serving clients of educational systems effectively. As a result, schools and districts are looking to private funding as a financial alternative for dealing with insufficient public moneys.

In the past, private funds were used by schools and districts to supplement the public moneys they received. Secondary schools charged student activity fees. Students and teachers raised money through a variety of activities, including hot dog sales, carnivals, and car washes. The profits were used for such purposes as purchasing school equipment and supplementing extended field trips. Small businesses and corporations gave discounts on goods used in, or sold at, fund raising events. Parents donated their time and knowledge to raising money for the purchase of pianos, adventure playgrounds, or team uniforms. School districts participated by raising scholarship moneys from private citizens and community groups. The infusion of private funds into the public school system provided the "little extras". Today, many schools and districts in B.C. are looking at private funds to meet basic costs.

Turning to private funding for needed educational programs is not unique to public school systems. In California for example, schools and school districts have turned to private sources to finance many programs that otherwise would have been eliminated with the passage of Proposition 13. Various California jurisdictions have instituted successful fund raising programs and set up successful charitable foundations in their endeavors to raise private funds (Allen, & Hughes, 1982). Corporations and small businesses have been generous in donating their resources, particularly through youth employment programs (Benson, 1982).

In British Columbia, school districts have begun to turn to existing charitable foundations to seek funds for computer hardware (Note 3) and leadership programs in race relations and multicultural education (Vancouver Foundation, 1983). In the near future B.C. school and district administrators could find their roles extending into the arena of public relations for raising funds to finance needed programs. If this trend takes place, it will be of the utmost importance that administrators communicate their needs to private funding sources and oversee locally established guidelines and principles for collecting and allocating funds. The spin off effects from such action by administrators could add favourably to school-community and school-home relations, and the beneficiaries will be the students. Otherwise the donors will not see the worth of their contribution, and schools and districts that have ineffective private funding practices will find that they are not benefiting from the potential value of private funding.

Statement of the Research Problem

The central problem of this study was to examine the question of private funding for public elementary and secondary education in the province of British Columbia.

More specifically, the study attempted to investigate the following subproblems:

1. What are the sources and allocation of private funds at the school district and school level?
2. What are the components of school district level and school level private funding practices?
3. What are the major issues in private funding for public education?
4. What are effective practices for private funding for public education?

Rationale of the Study

As schools and districts turn to private funding as a means for effectively serving their clients with quality programs, administrators will find it necessary to become knowledgeable of effective private funding practices for public education. The topic of private funding for public education has received little attention from researchers. In the literature, case studies (in diary form) are cited from the U.S. pointing out the dollar amount raised from a particular school fund raising program activity. Other studies have focused on public school systems which have been affected by legislation that limits taxes; for example, the passages of Proposition 13 in California and Proposition 2 1/2 in Massachusettes. These studies were conducted at the district level and describe how and why charitable foundations were established, and analyze the success of the foundations by giving an account of the dollar amount raised (Neill, 1983; Allen, & Hughes, 1982). In Canada, a study conducted by the Alberta Teachers' Association determined the extent to which programs were supplemented by private funds and determined the sources of those funds (Alberta Teachers' Association, 1984). The U.S. and Alberta studies have a shortcoming, in that they fail to delineate the benefits and dysbenefits (Note 4) of private funding at either the school or district level.

To examine the central problem of this study, an investigation was made of the sources and allocations of private funds and the funding practices found in a selected number of schools and districts in British Columbia. Major issues and effective practices relating to school and district involvement in private funding were identified through an investigation of superintendents′ and principals′ opinions. It was anticipated that the results of this study would provide insight and clarification into the benefits and dysbenefits of private funding for public elementary and secondary education. With this knowledge the educational community would be in a better position to understand and institute effective private funding practices.

Overview of the Study

In the first chapter the problem is stated and the significance of the problem is discussed . Chapter 2 reviews the research literature, outlines the constraints of private support that relates to the problem, and defines terms. Chapter 3 describes the instrumentation, delimitations, and assumptions of this study. Chapter 4 discusses and analyzes the data collected. A summary and conclusion of the study and implications of the problem are found in Chapter 5, followed by Appendices which contain pertinent information relating to this study.

Notes for Chapter 1

1. The terms "school district" and "district" will be used interchangeably in this study.

2. The terms "program(s)" and "service(s)" will be used interchangeably in this study (unless otherwise specified).

3. In a telephone conversation with an employee at the Vancouver Foundation on September 12, 1984, mention was made that two school districts in the province to date have been given grants for the purchase of computer hardware.

4. The term "dysbenefit" is a technical term meaning an "ill-benefit" as opposed to "cost", which is the reversal of a benefit or is not a benefit.

CHAPTER 2

ANALYSIS OF THE PROBLEM

Introduction

To analyze the question of private funding for B.C. public education, it was necessary to go well beyond the literature on private support for public schools. Philanthropic, public relations, medical services, and post-secondary education literature were included to gain insight into the problem. This chapter begins by giving a background of philanthropy and private support for B.C. public schools. A discussion then follows on those aspects of the literature related to the origins of private support for public education and methods of pursuing that support. This is followed by a summary containing generalizations regarding the benefits and constraints of private support for public education. Specific subproblems to be investigated in this study are then developed. The chapter ends with definitions of terms that are pertinent to this study.

Background of Philanthropy and Private Support for B.C. Public Schools

Insight into philanthropy extends beyond that of philanthropic statistics. Understanding is gained through knowledge of how economic climate, tax laws, and public relations affect philanthropy. With this insight and with a historical account of private support for B.C. public schools a background is provided for an analysis into private funding for public education.

Philanthropy in North America

Philanthropy is made possible through private wealth and earnings, and is dependent upon them (Brakeley Jr., 1980). Based on figures compiled in 1979 for Canada and 1980 for the U.S., it was estimated that Americans donated $47 billion to all sectors of society (Brakeley Jr., 1980), while Canadians donated an estimated $1.34 billion (Arlett, 1982). Taking Canada's population as one-tenth of the U.S. population, it can be seen that Americans on a per capita basis donated approximately four times more than Canadians. While the per capita amount greatly differs, it is found that the percentage breakdown for the sources of philanthropic funds is less significant. In Canada, corporations contributed 12.8% of the funds while the U.S. figure was 5.3%. Charitable foundations in Canada gave 8.2% while in the U.S. the figure was 5.0%. Gifts by way of bequest and individual monetary gifts (approximately 80% for Canada and 90% for the

U.S.) made up the remainder of the funds (Note 1).

Philanthropic statistics from longitudinal studies for Canada are unavailable, but research done in the U.S. shows that the distribution of funds has been consistent over the decades. It is estimated that 14% of the funds go to various educational levels and systems (Havighurst, 1981). While it is difficult to estimate the breakdown, Robert Havighurst (1981) found that a large part of the educational funding either goes to the basic support of the status quo at the post-secondary level or to support change or experimentation at the elementary and secondary level. Little goes directly to public schools and districts to support existing programs.

The dollar amount given for charitable purposes is one philanthropic statistic that is analyzed. Another is the amount of time put in by volunteers and professionals to raise and distribute funds. Generally, for every dollar raised it is estimated that a dollar in time is put in by individuals (Brakeley Jr., 1980). It is self-evident that the amount of time put into philanthropy by individuals is an essential element that is considered in investigating private funding practices (Lovelock, & Weinberg, 1984).

Philanthropic literature and longitudinal studies suggest that philanthropy is affected by external conditions such as economic climate and tax laws and internal conditions such as public relations.

The Effects of Economic Climate and Tax Laws on Philanthropy

Historically, studies done in the U.S. have shown that "...philanthropy appears to have no inherent restrictions, other than those implied by the tax laws" (Brakeley Jr., 1980, p. 3). It has further been observed that the Philanthropic Index has risen steadily, like the GNP index, over the decades. During years of financial distress, such as the Depression Years from 1929 through 1938, it did not follow the 50% drop of the GNP index, instead it remained at about 83% of its pre-Depression level. To quote George Brakeley Jr. (1980):

> ...philanthropy, although affected by economic conditions, has become so much a part of the American ethos that, at worst, it tends to plateau in bad times, and in good times, to continue upwards (p. 6).

In Canada, a Gallup poll taken in 1984 showed the number of Canadians contributing to charities to be 77%, down from 88% in 1981 (Polanyi, 1984). However, it is estimated by Allan Arlett (Polanyi, 1984), exective director of the Canadian Centre for Philanthropy, that Canadians gave between $2 and $3 billion to charities in 1984, a substantial increase from 1979. With the donated dollar amount on the increase, notwithstanding the decrease in the number of contributors, it is no wonder that bad economic times do not deter groups from soliciting for moneys. Arlett estimated that the number of registered charities in Canada grew from 42,000 in 1981 to 49,000 in 1984 (Polanyi, 1984). These statistics show that although philanthropic funds are not easily acquired, the competition among donees has increased. This situation forces fund raisers to develop tactics that will make the public aware of the importance of donated support-- in terms of both money and time.

To assist fund raisers with increasing the number of contributors and the dollar amount donated, some charitable organizations are opting for reform of the Canadian taxing system. Ian Morrison, spokesperson for the National Voluntary Organizations Coalition (Polanyi, 1984), feels that current tax incentives "...favour the rich and discriminate against the middle-income and low-income Canadians" (p. 10). The 1984 Gallup poll shows public support for reforms to tax laws that increase the incentive to donate. The poll showed that 50% of those canvassed favoured a tax reform that gives a 50% credit on charitable donations for all Canadians (Polanyi, 1984).

Such a reform in tax laws is not easily obtained. Lobbying for tax reforms is a long-term concern of registered charities and finding innovative tactics to increase charitable funds is an immediate concern. A key element to increasing charitable funds is public relations.

The Importance of Public Relations in Philanthropy

A review of philanthropic literature shows that certain charitable organizations perform better than others, in either good or bad economic times, due to their ability to execute programs that earn the understanding and interest of potential donors.

Not a single public institution in a modern industrial society can enjoy success without public support. Hospitals have managed to deal with public disenchantment and at the same time have become one of the major and more successful raisers of charitable funds (Kurtz, 1980). This can be attributed to their public relations network.

Public institutions do not decide whether or not a public relations program should exist but rather, what form the program should take. Programs adopted by an institution because there is public misunderstanding or disenchantment are usually conducted to restore a congenial relationship. This use of public relations as a panacea is seldom effective (Bronzan, 1970), whereas programs of high quality are more successful. Many writers on the subject of public relations agree that it needs to be well planned, on-going, ever-changing, and aimed at specific groups (Lovelock, & Weinberg, 1984; Hilldrup, 1982; Walling, 1982; Brakeley Jr., 1980; Kurtz, 1980; Ayars, & Cupehart, 1971; Bronzan, 1970).

History of Private Support for B.C. Public Schools

Public elementary and secondary schools in B.C. have always been supported in a peripheral way by the private sector. In colonial times the Hudson´s Bay Company authorized that education be provided for the children of the company´s officers. Two schools were built in 1849, one serving Protestant families and the other Catholic families.

As the colony began to attract settlers, the Company continued to support the construction of schools; however assistance was limited to furnishing school sites. By 1851, Governor Douglas, recommended that colonial funds be used to build schools in Victoria and Esquimalt for the children "...of the labouring and poorer classes" (Johnson, 1964, p. 17). These schools were intended to be the nucleus of a non-sectarian public school system and were maintained by annual fees paid by parents. It was not until the Public School Act of 1872, through the action of advocates such as William Amor de Cosmos and John Robson, that non-sectarian schools free of fees were established for children between the ages of six and 16.

The Act did not stop philanthropic support for public education. In 1874 the Cache Creek School was built on donated land (Note 2). During the early 1870s sawmill companies in the Burrard Inlet area built schools which doubled as community centres. As public education in the province developed, private support moved away from real estate donations and turned towards support that would provide the "little extras" for schools and districts.

Private Support for Public Education: Origins and Methods

The research literature lacks studies that show the importance of private support for public education; however a study conducted in Alberta provides insight into sources and allocations of private funds for public schools (Alberta Teachers' Association, 1984).

Private support for public education includes not only philanthropic funds such as gifts (non-monetary and monetary), but also funds raised through the activities and efforts of students, teachers, and parents. In conjunction, school districts have sought the support of charitable foundations. Additional support in the form of volunteers and scholarships has come from the community (individuals, organizations, businesses, and corporations). One form of private funding support which would not fall into the category of philanthropic funds is student fees (user-fees or service charges).

The literature on private support further illustrates the importance of target groups and this is exemplified in B.C.´s post-secondary institutions. Policy and district size have also been shown to have an affect on private support, as does administration.

Sources and Allocation of Private Funds for Public Schools

Philanthropic statistics show that the major contributors of funds are individuals, followed by corporations and foundations. This has been the case in the 20th Century for both the U.S. and Canada. The amount of funds distributed to public elementary and secondary school, while undetermined, is a small percentage of the total allocated to all levels and systems of education. While the funds given by foundations usually go to initiate programs, little goes to established basic programs and services.

At the public school level, moneys can come from fund raising activities, donated gifts, donated scholarship funds, and student fees and service charges. No research has been conducted in the B.C. public school system identifying the sources and allocation of private funds.

A study conducted by the Alberta Teachers´ Association for the 1982/83 school year (Alberta Teachers´ Association, 1984) showed that $11.6 million in private funds was raised by Alberta´s public schools (a further $6.9 million was collected in fees and turned over to school boards). The percentage breakdown for sources of the $11.6 million in funds were:

1) 44.0% from fees (excluding amounts rebated to students and turned over to boards).
2) 35.6% from fund raising activities.
3) 7.9% from gifts or donations (including the cash value of donated equipment).
4) 12.5% from other sources such as school sales and cafeteria profits.

The percentage breakdown for the allocation of these funds was:

1) 54.6% to curricular programs.
2) 34.0% to extra-curricular programs.
3) 4.3% to other expenses not reported for use in curricular and extra-curricular programs (includes charitable donations).
4) 7.1% kept in surplus.

The Alberta Teachers´ Association study is important because it shows that schools have a significant role to play in generating private funds that are to be used for educational programs. Unfortunately, the study has two shortcomings. It does not give a clear picture of private funding for public education at the district level and does not analyze the effectiveness of private funding practices. To overcome these shortcomings, information would have to be collected regarding school district raised funds, as well as data concerning the components of private funding practices. The study outlined in this thesis attempts to overcome these shortcomings by including this information (how this was done is discussed in Chapter 3).

Fund Raising for Public Schools

Fund raising serves two purposes for public elementary and secondary education. One is a monetary purpose, where moneys are raised through the efforts of students, teachers, and parents. The other is a twofold non-monetary purpose: firstly, students are provided with learning opportunities and secondly, school-community relations may be enhanced. The ultimate success of these purposes will only be achieved if a school fund raising program is well planned and publicized.

Fund Raising Fundamentals. The literature on school fund raising (Moorhead, 1984; Armstrong, 1983; Crossland, & Trachtenberg, 1982; King, 1981; Cohen, 1980; Paradiso, 1980; Voorhees, 1971; Bronzan, 1970) includes the following as being fundamental to a successful school fund raising program:

1. Establishment of definite goals and objectives for the funds that are being sought, long-range planning, and coordination of activities. Knowledge of the exact dollar amount needed, what the funds will be used for, and the donor group to be targeted.
2. Evaluation of resources in terms of personnel (including volunteers) and money needed to promote and control the program. Consideration for hiring a professional fund raiser in terms of profits and existing resources.
3. Calculation of potential costs and profits. Knowledge of required inventories, quality of goods, and marketability of goods.
4. Preparation for potential stumbling blocks, preventative procedures, and alternative solutions.
5. Establishment of effective publicity networks and utilization of the media that clearly define the goals and objectives of the fund raising program to the target group.
6. Procedures that inform the school and community on the progress of the program.
7. Accurate record keeping and knowledge of school board policies.

8. Establishment of a "thank you" procedure for those people, organizations, and agencies that were involved in the activities and program.

Following these fundamentals will not only ensure that everything possible has been done to achieve the highest dollar profit, but also that all members of the community and school have been served effectively by the school fund raising program.

Fund Raising: Benefits Beyond the Monetary Gain. Effective public relations is part of an effective school fund raising program (Bronzan, 1970). Networks are established to define the program's goals to those people in the community who will be affected by the fund raising program. As with any form of parent and community involvement in schools, the conditions under which involvement is most beneficial are determined so that positive results occur in school-community and school-home relations (Fullan, 1982). A carnival, for example, can be one of many school activities which brings the community into the school. To cite Michael Fullan (1982):

> ...frequent contacts within the school provide knowledge and confidence for those who have always felt daunted just walking into a school...(p. 203).

By having parents participate in the organization of fund raising activities related to classroom instruction, such as "read-athons", school-home relations may be enhanced.

Within a school fund raising program there are a number of activities which provide learning opportunities for students and are consequently a hidden educational value of an effective school fund raising program.

Most of the literature on fund raising activities at the public school level takes the form of case studies which are written in diary form. In these cases, the authors outline various learning opportunities which were provided for students. An analysis of five cases (Note 3) demonstrates that student learning in fund raising activities can supplement classroom instruction. The learning opportunities that are provided for students through fund raising activities include:

1. Experience into the failures and successes of the real world, which helps to build self-esteem (Evans, 1983; Dziuk, 1983; Bettker, 1980).
2. Long-term planning and goal setting (Evans, 1983; Dziuk, 1983, Bettker, 1980).
3. "Real" money management (Dziuk, 1983; Bettker, 1980; Woods, 1980).
4. Learning skills of utilization, cooperation, and manipulation (Evans, 1983; Bettker, 1980; Woods, 1980).
5. Reinforcement of skills taught in the classroom, or

teaching new skills such as those found in art, accounting, construction, sewing, and graphics (Evans, 1983; Dziuk, 1983; Bettker, 1980; Woods, 1980).

6. Learning communication skills with an assortment of people found in the community (for example, parents, non-parents, business people, school board members) (Welin, Daloyan, & Quinn, 1980; Woods, 1980).

Such learning opportunities are not without concerns. Activities requiring door-to-door soliciting by students can place canvassers at risk. The Federation of Women Teachers Association of Ontario recognises this and have endorsed a resolution calling for a ban on door-to-door selling by students ("Teachers say", 1984).

Private Support Through Charitable Foundations

Charitable foundations provide a vehicle through which schools and school districts can support educational initiatives. In B.C. according to the *Canadian Directory to Foundations and Granting Agencies* (Arlett, 1982), public schools received grant money from a number of foundations (see Appendix A). When applying for grants, schools and districts have been successful in securing funding for innovative programs (Arlett, 1982); however applications are not always restricted to innovative programs. For example, if the foundation feels the funding is for a cause that needs "seed money", then a grant will be given.

The scope of foundation support is not restricted to the granting procedure. School districts can set up their own foundations to raise funds.

Foundation Approach to Raising Funds. By establishing its own foundation a school district can oversee that necessary funds are available to initiate and maintain needed educational programs. This approach to fund raising has proven successful for U.S. school districts operating in a fiscal crisis environment (Neill, 1983; Kommers, 1983; Allen, & Hughes, 1982). A survey of California school districts in 1981/82 (Neill, 1983; Allen, & Hughes, 1982) found that those with foundations "...were significantly more successful in fund raising" (Neill, 1983, p. 1). While districts without foundations raised $7,540, those with foundations raised $60,952. The study concluded that the success of the foundation approach to fund raising was threefold (Allen, & Hughes, 1982):

> ...1) its structure is separate from the governing structure of the school district, giving it an independent base from which to argue the district's financial case; 2) the foundation structure is a time-tested vehicle for mobilizing community support and providing a forum for active participation and 3) it signals district commitment to an active program, which can appeal to potential donors (p. 29).

At the public school level, foundation funding manifests itself in a variety of ways. Foundations may choose to allocate their funds directly to teachers, to turn the funds over to the school district, or make grants to special programs. The California study indicated that most foundations turned the funds over to school districts to use at their own discretion. The study found that those foundations which instituted a granting approach would not embark on an endeavor if objections were voiced by the district.

The Income Tax Act of Canada sets out the criteria by which an organization can reduce the amount of tax it may be obliged to pay, and are found in the circular on "Registered Charities" put out by the Deputy Minister of National Revenue for Taxation (1980). The terms of reference for qualifying as a foundation are purpose, objectives, and operation. When considering setting up a foundation, a district decides beforehand whether in their circumstances this approach is appropriate for raising funds. Merely registering as a "Canadian amateur athletic association" or a "charitable organization" may be sufficient because the funds raised are distributed for the district's own activities. A "charitable foundation", which is a trust or corporation, raises the funds separately from the school district and at the same time distributes the funds to the district. The foundation approach, if it is to be successful, requires detailed planning.

George Neill (1983) recommends adoption of the following plan when deciding whether or not to establish a foundation:

> --That the board of education with the superintendent, develop a clear statement of purpose for the foundation.
> --That the school district pay for basic costs, such as legal work, filing fees, and other expenses necessary to begin operation
> --That the district attorney be contacted to prepare articles of incorporation and bylaws for the foundation. The attorney would also advise the board on the most appropriate way to set up the relationship between the school district and the board of trustees for the foundation.
> --That the superintendent and members of the board of education begin work on appointing members to the foundation´s board of trustees.
> --That the foundation board of trustees be viewed as a prestigious group (members should be at the top of their field).
> --That advertising and public relations be considered essential in planning strategies for an approach to community (pp. 4-5).

. Seed money to establish the foundation can come from the school board, existing foundations, and community groups such as the Rotary or Kiwanis clubs. (In the long-term a broad range of sources within the community can be found.) Once the foundation is established, individuals (who according to philanthropic research give the most to charity) and corporations are the likely target groups. The statistics mentioned earlier indicate that the funds exist, but must be identified and secured.

Support from teachers and principals is essential for the foundation's programs (Neill, 1983). Support for the foundation occurs at the school site level, with the school being used as a liaison mechanism between the community and the foundation. By being responsive and open to parents' ideas, opinions, and concerns regarding the foundation and its operation and activities, parental support increases. Community support increases by involving businesses and agencies in partnership programs. Teachers' acceptance of the distribution of funds is essential to the foundation's success. Funds going directly to teachers is a "...symbolic value that goes beyond the purpose of the project" (Neill, 1983, pp. 11-12). According to Albert Fondy, president of the Pittsburgh teachers' union, in times of restraint the foundation program,

> ...provides an avenue, a route of support, for those teachers who are especially eager to do things in the classroom that go beyond the usual routine (Neill, 1983, p. 12).

To review the major points concerning the foundation approach to raising funds, it was found that there are certain tax advantages for donors. There is also flexibility for funding non-innovative programs, which does not exist when applying for grants through other foundations. Once the school district has determined that a foundation needs to be established, proper planning procedures are required which include the goals and objectives of the foundation. Foundations are more successful if they are independent of the school board. Effective public relations networks with those groups in the community who are in some way affected by the purpose of the foundation are essential. Professional help from professional fund raisers, lawyers, and accountants is worth considering when establishing the foundation.

Using the foundation approach for raising funds is not without disadvantages for school boards and administrators. Firstly, they have no control over the distribution of foundation funds. The exclusion of these groups from the foundation´s board lessens their ability to influence school programs. Secondly, the foundation´s board may be more accountable to the donors than it is to the school district, schools, and parents (Neill, 1983).

Community and Home Support for Public Schools

A non-monetary form of support that can be found in public schools is that of volunteers. These people are important not only for carrying on fund raising campaigns, but also because they come from those groups in the community who are potential funding sources. As well, the volunteers form the resource which helps schools and districts to provide quality educational programs or services. In time it is the student who benefits from volunteers in terms of the extra financial support provided and the voluntary time given to supporting programs.

Through the use of an effective public relations network, in terms of volunteers and resources, support from the immediate and associated groups can be increased. Literature from the U.S. shows that there may also be non-monetary support by disassociated and institutionalized groups through adopt-a-school programs. These are programs where corporations and businesses contribute both their resources, knowledge and time to teaching or to school programs. In Houston, Texas, 66 corporations and businesses using 600 people went into 63 schools to teach courses (Gray, 1984). Oil companies taught geology, mathematics, and science courses. IBM volunteered computer tutors. The American Institute of Architects implemented an eight week program, "Architecture is Fun", for a number of schools. Southwestern Bell provided programs on management for school administrators. Similar programs can be found in St. Louis, Chicago, Pennsylvania, and San Francisco (Gray, 1984).

The American division of the Chevron Corporation in 1984 became involved in an adopt-a-school program at Cowan Avenue

Elementary in the Los Angeles Unified School District (Simone, 1984) and recently a Canadian subsiduary, Chevron Canada Limited, signed an agreement with the Vancouver School Board establishing a partnership with Templeton Secondary School (Chevron Canada Limited, 1984). The program gives Templeton´s teachers and students access to the time and knowledge of Chevron employees. Chevron hopes that through the contact, teachers and students will have a better understanding of the skills needed for the workplace. Chevron sees the contact as a way of promoting "...the company as a community conscious organization" (Chevron Canada Limited, 1984, p. 1).

Adopt-a-school programs are not without their problems. Concerns have been raised by labour unions and environmental groups labelling the concern as "business propaganda" (Benson, 1982), meaning that well-intentioned businesses or corporations have subjected their adoptees to dogma that is unchallenged by other interest groups or public officials. Charles Benson (1983) cites an editorial from the Sacramento Bee as an example:

> One corporate executive...recently wrote in the Wall Street Journal, "One of the most rewarding afternoons I ever spent was with an eighth-grade class, guiding them through an understanding of economics of scales. By the end of a 40-minute session, the 12-years-olds were able to decide why it was better to build one large blast furnace than five smaller ones" (p. 523).

The interesting part of this editorial is that upon further investigation it was learned that such a solution was prohibited under the U.S. antitrust laws. Public schools, according to Benson (1983), must consider "business propaganda" in light of the long term effects it may have on the values of future adults versus its present attractiveness during the present fiscal climate.

Though there are no measurable benefits for students volunteers may, as John Goodlad (1984) suggests, reduce teachers´ workloads thus keeping teachers´ levels of enthusiasm and creativity high. `Organized´ school-home and school-community partnerships have a tradition which frees teachers from preparing materials, collecting money for lunches and school sales, distributing and collecting textbooks, and supervising students on playgrounds (Gray, 1984). More recently, volunteer programs have been established for tutoring. Not only do such volunteer services impact on students´ achievement and public confidence in education, they also assist in keeping down the costs of financing school programs through the use of paid personnel.

Just as there are benefits to having school-home partnerships, be they for school sales or tutoring, there are also constraints which are applicable to voluntary support in public schools. Research done by Annette Lareau and Charles Benson (1984) suggests that school-home partnerships are more likely to take firm root in schools serving the middle class than those serving the working class. They showed that working class parents volunteered less time and raised less money in fund raising events than middle class parents. A number of reasons were cited for the discrepancies, with social and cultural differences being most prominent. A major finding from interviews conducted with the parents was that working class parents view the education of their children as a school responsibility, while middle class parents view their children´s education as a joint responsibility. In other words, the middle class parents view teachers as partners whose efforts they must supplement.

Scholarships

Scholarships, a traditional form of support for public education in B.C., come from universities, the provincial government, and from an array of private sources including foundations, private citizens, businesses, corporations, and community clubs. They take the form of bursaries or awards for students pursuing a post-secondary education.

University scholarships go to Grade 12 students who plan to attend the university which gave out the scholarship and which may have been given for either academic or athletic achievement. The scholarship funds form a part of the university's budget and may have originated from either private or public sources.

Provincial government scholarships come from the provincial education budget and go to Grade 12 students who achieve a certain standard on government scholarship examinations. One thousand dollar scholarships are given out based on the formula of 3% of the Grade 12 enrolment plus an extra amount totaling $20,000 for students showing outstanding scholarship examination results (Note 4).

Privately funded scholarships exist at both the school and school district levels. At the district level, scholarships may not be restricted to Grade 12 students. The sources of these funds may include private citizens, businesses, local community clubs, corporations, charitable foundations, and teachers' associations.

At the school level, scholarships may not be restricted to Grade 12 students. The sources of these funds are the same as those at the district level, plus funds from student council fees and fund raising profits.

User-fee or Service Charge Systems: Medical Services Versus Education

One form of private support which falls outside the category of philanthropic funds is student fees. Students are charged user-fees or service charges for programs which suit their educational pursuits. In comparing fee systems education with those in medical services, there are similarities and dissimilarities .

Research done in medical services indicates that charges to clients (Note 5) reduce the utilization of services by clients (Brook, Ware, Rogers, et al., 1983; Newhouse, Manning, & Morris, 1981; Barer, Evans, & Stoddart, 1979, Badgley, & Smith, 1979). In education the goal is not to get students (clients) to use the service less. On the contrary, the goal is to provide every student with the best program possible to meet their individual needs and abilities.

Although it can not be shown empirically, it is possible to illustrate a similarity in the way in which fees or charges in medical services and education affect lower income groups. Some experts on the implementation of fees or charges in medical services claim that the cost of the service is being shifted onto the individual (Donaldson, 1984; Evans, 1984; Kesselmen, 1984; Badgley, & Smith, 1979). They further claim that a negative effect of such action is the financial burden placed upon the socially disadvantaged, the poor and elderly. In education this same negative effect occurs with lower income groups. Most fees or charges take the forms of deposits, rentals, club charges, transportation costs, and material costs for student projects. The fees or charges are often implemented in courses having a non-academic nature, such as industrial education and home economics. The students most likely to be taking these courses come from families at the bottom of the income scale (Whitty, 1984). Lower income parents may not be obligated to pay for these fees or charges, however the desire for their children to have quality programs indirectly places an extra financial burden on the parents. In contrast, this financial burden is not felt to the same degree by middle or higher income families whose children are taking more, less costly academic courses and fewer non-academic courses.

Dissatisfaction with fees or charges in education is illustrated in a recent small claims court case in Alberta ("User Fee", 1985). The case may be a signal to the educational community that parents are beginning to view fees or charges as an extra tax. The court upheld a parent´s refusal to pay textbook charges and stated, in part, that parents can not be forced to pay rental fees levied by public schools. The parent commented:

> I object strongly to extra billing,...I think it´s disgusting a child in the richest province in Canada can´t get a basic Grade 10 education without paying for it ("User Fee", 1985, p. A-9).

Unlike medical services, education´s aim is not to use fees or charges to reduce the utilization of services. On the contrary, fees or charges are used to provide students with the best programs possible to suit their needs. Such an aim is not without problems. The tenet that public education is equal for all is undermined by placing an extra financial burden on low income families. At the monetary level, fees or charges in public education are an extra tax.

The Importance of Target Groups for Private Support

The National School Public Relations Association, in the U.S., has identified four groups which educational institutions should target in their effort to gather private support. According to Robert Bronzan (1970), each group is important and interaction with each is unique:

1. Immediate group: includes students, teachers, employees, parents, alumni, school organizations, and close relatives of these sub-groups.
2. Associated group: includes women´s and youth clubs, prospective clients, religious groups, professional and educational associations, civic services, consistent supporters, enterprises engaged in commercial relationships with the institution, distant relatives and friends of immediate and associated groups.

3. Disassociated group: includes persons or groups in favour or opposed to important school issues; for example, industrial and commercial groups, government employees, political groups, and special interest groups not found in the immediate and associated groups.
4. Institutional group: includes persons or groups that are disassociated but have their own immediate groups and interests; for example, ethnic groups, exclusive social clubs, senior citizens, government agencies, and fraternal organizations.

The further a group is removed from a school´s day-to-day activities, the less interest and involvement there is by the group and consequently, the less contact there is with the group (Bronzan, 1970). The public relations network which an educational institution builds with the disassociated or institutionalized groups is most often based upon indirect joint involvement in service, social or business activities. With the immediate or associated groups, an effective public relations network is in place if a school is operating effectively. The immediate and associated groups are not only important in effective public relations, but are the groups which donate the most money and volunteer the most time.

The importance of target groups to educational institutions raising private funds during bad economic times is exemplified in British Columbia. Post-secondary schools are finding that to maintain their level of service in the current crisis environment they have to concentrate and depend upon, to an increasing extent, the immediate and associated groups. As examples:

1. Simon Fraser University's vice-president of extension and development, Jack Blaney, feels that alumni campaigns must become an annual event with higher donation targets than have been set in past years (Volkart, 1984a).
2. B.C. Institute of Technology's (BCIT) president, Gordon Thom, feels that corporations are first on their list in an effort to raise funds, because the business community has had good experiences with BCIT's graduates. Next on BCIT's list are the alumni and Thom points out this will be the first time alumni will be challenged to make contributions (Volkart, 1984a).
3. The University of British Columbia has just created a position for a vice-president of development and community relations to be administrated by David McMillan. The new position will emphasize fund raising and public relations (Volkart, 1984b).

In reporting on these post-secondary institutions, Carol Volkart (1984b) points out that canvassing will not be done on a door-to-door basis because the fund raisers feel people tend to be less sympathetic when approached this way. To cite Blaney (Volkart, 1984a):

> You have to target certain people. They have to see the benefit of what you´re doing...They have to understand what you want it [funds] for and that you will use it for that and that it will make a difference to the university and the community (p. A-2).

Post-secondary schools in the U.S. have a tradition of seeking funds from a variety of groups. Spokespeople for B.C.´s post-secondary schools feel they are not being as successful as their U.S. counterparts due to potential donor´s attitudes. According to Brakeley Jr. (1980), philanthropy in the U.S. has become "...a part of the American ethos..." (p. 6). In Canada, people believe that the public tax dollar will take care of everything (Volkart, 1984b).

The statistical evidence shows that Canadians on a per capita basis contribute approximately four times less than Americans (Arlett, 1982; Brakeley Jr., 1980), but Canadian philanthropic statistics indicate encouraging figures for fund raisers. The dollar amount being raised for charities has increased over the years (Polanyi, 1984; Arlett, 1982).

Educational institutions reach potential donors by implementing effective private funding practices, including effective public relations networks aimed at appropriate target groups (Bronzan, 1970). Development of innovative methods assist in showing potential donors the worth of their contributions. In Canada, making charitable contributions may not be a tradition as it is in the U.S., but lobbying for reforms to tax laws and effective public relations will make contributing funds and resources attractive to the immediate and associated groups. In time, and through innovative programs, the disassociated and institutionalized groups will find the contribution of their resources attractive, as has been the case with "adopt-a-school" programs in elementary and secondary public schools.

The Effects of District Size(Enrolment) on Private Support

The literature on private support for public schools suggests that private funds may be affected by district size (enrolment). Charles Benson (1982) points out that large districts may draw relatively little money from individual donations:

> The bigger the unit of government, the less likely that any single individual will see a connection between the size of his or her voluntary contribution and the benefits received; hence the contribution might well be zero (p. 531).

An example (Benson, 1982) is the individual who is in a school district of 25,000 students and gives a donation, does not expect to see much change from his or her contribution. Since this feeling is shared, few individuals in large school districts contribute to fund drives. In contrast, an individual in a school district of 2,000 students will likely contribute to a fund drive because his or her neighbours may note his or her support, or lack of it. This pressure makes the prospective donor in a small school district more inclined to share.

The Effects of Policy on Private Support

Private support for public education is affected by provincial legislation and can further be affected by school and school district policy. In B.C., constraints show up in the School Act, School Act Regulations, and Administrative Handbook on collecting and allocating private funds at the school district and school levels. According to the School Act Regulations (B.C. Ministry of Education, 1982b):

> There shall be no charges, other than those authorized under the Act, to parents or guardians for required courses, and no charges for books, school supplies, and activities in optional courses without the approval of the boards (p. 6).

This means that a school district may deem it necessary for parents to cover the cost of consumable workbooks for a district-wide program or cover the cost of transportation for sporting events. The details of these fees and charges are often written out as district policy. Using transportation as an example, a policy may state that the board will cover 100% of the cost for curricular fieldtrips, while the coverage for extra-curricular fieldtrips will be 50%.

As for collecting philanthropic funds, there are no guidelines in the School Act for districts to follow. The autonomy of school districts is guided by board policy. For example, a board may impose a regulation that donated equipment will not be accepted without prior board approval because of the costs which may have to be incurred as a result of future repairs or replacement of the equipment. As for cash donations, the board policy may state that the district can not accept cash donations without giving the donor a tax exemption receipt stating the district´s charitable status (i.e. charitable tax exemption number).

Generally, school district autonomy is under no constraints except those relating to fees and charges for required courses and materials. At the same time, there are no guidelines to encourage the collecting of philanthropic funds except those deemed necessary by the board to initiate, maintain and promote educational programs. A board may see the need for scholarships and decide if scholarships are a school level or a school district responsibility. If a board decides that there should be district level scholarships, they then decide if the funding sources will be from trust funds, foundation grants, private donations, or all three.

The autonomy given to schools over seeking and accepting philanthropic funds is constrained by existing district and school policy. The Administrative Handbook makes suggestions about how funding practices are to be carried out. Schools are only accountable to themselves unless there is a policy which may, for example, require periodic audits. According to the Administrative Handbook:

> Money raised by a group should be spent either on behalf of that group or as a result of long-term planning by that group (B.C. Ministry of Education, 1982a, p. 706).

For the most part, schools are constrained by local board policies.

Administration of Private Support

The key players in obtaining private support for public schools are administrators. At the school level it is the principal or a school coordinator and at the district level it is the superintendent or a designate (Roper, 1984; Neill, 1983). Administrators become an integral part of the public relations network. They make themselves visible to community groups and agencies, parents, students, and teachers. Contact in an informal environment often produces a positive image for the school and/or school district (Roper, 1984).

There is no doubt that the allocation of administrative time is a major consideration which is dealt with according to each circumstance. To quote Charles Conroy (1984):

> Public relations and fund raising programs, if they are to be administered properly, must be viewed as management tasks on a par with budgeting, curriculum development, personnel selection, and program evaluation (p. 102).

Fund raising programs are administrated by the principal or superintendent with the assistance of others on the administration team. The successful administrator has the ability to delegate responsibilities and control the objectives of the program.

Summary

In analyzing the question of private funding for public education, the literature has shown that there is private support for public education and a variety of methods are available for securing that support. Administrators have a major role to play, however they work within the constraints of private support to preserve the the benefits of private funding. Through innovative tactics and effective funding practices, the constraints can be minimized. Outlined below are generalizations derived from the literature regarding the benefits and constraints of private support.

Benefits of Private Support for Public Education

1. Private funds are available to supplement public school programs (Alberta Teachers´ Association, 1984; Arlett, 1982).
2. Some fund raising activities provide learning opportunities for student (Evans, 1983; Dziuk, 1983; Bettker, 1980; Welin, Daloyan, & Quinn, 1980; Woods, 1980).
3. Some fund raising activities may assist in enhancing school-community relations (Fullan, 1982).
4. Private support in the form of volunteers reduces teachers´ workloads (Goodlad, 1984) and assist in financing school programs that would otherwise be carried out with paid personnel (Gray, 1984).
5. Though it is not clear from the literature, it seems to be implied that some private funding vehicles may give a sense of increased autonomy (B.C. Ministry of Education, 1982a).

Constraints of Private Support for Public Education

1. In a fiscal crisis environment philanthropic funds do not decrease, at worse they plateau. However, the number of contributors decrease and the number of registered charities increase. In other words, competion for philanthropic funds increases (Polanyi, 1984; Arlett, 1982; Brakeley Jr., 1980).
2. In terms of donations and volunteer time, ineffective public relations or a lack of public relations, does not encourage private support (Conroy, 1984; Hilldrup, 1982; Walling, 1982; Ayars, & Cupehart, 1971; Bronzan, 1970).
3. Door-to-door soliciting by students exposes them to potential dangers ("Teachers Say", 1984).
4. Adopt-a-school programs create learning opportunities which may be biased in favour of business (Benson, 1983).
5. Raising private funds and gathering private support are costly in terms of time, energy, and overhead for both teachers and administrators (Roper, 1984; Conroy, 1984).
6. User-fees or service charges can become a financial burden on parents and may be viewed as an extra tax. Poor and disadvantaged families are

penalized by fees or charges ("User Fee", 1985; Whitty, 1984).

7. When applying for funds through the granting procedure of established charitable foundations, the funds are often restricted to innovative programs for the well-being of people (Arlett, 1982).

8. School district and school policy may restrict private support. For example, districts may need to approve the donation of equipment because of future costs which may be incurred due to repair and replacement of equipment.

9. User-fees or service charges in B.C. require board approval and are limited to optional courses and materials (B.C. Ministry of Education, 1982b). Fees or charges may be further restricted by school and district policy.

10. Private funding is constrained by wealth and earnings (Brakeley Jr., 1980). Though empirical evidence and research are unavailable, philanthropic literature suggests that regions with low unemployment and high income have an advantage in securing private funds.

11. Small school districts (rural) have greater success in securing individuals´ contributions than large school districts (urban) (Benson, 1982).

12. Schools serving students from middle class backgrounds get more parental support, in terms of volunteer time, than those schools serving students from working class backgrounds. At the same time, schools with working class children do not raise as much money from fund raising events as do those with middle class children (Lareau, & Benson, 1984).

13. School districts with foundations are more successful raising funds than those without foundations (Neill, 1983; Allen, & Hughes, 1982).

14. To a certain degree, foundations take away the control of the allocation of funds from school districts (Neill, 1983).

15. Foundations are more accountable to their donors than they are to school boards, schools, and parents (Neill, 1983).

Specific Subproblems

In light of the literature used to analyze the problem, the four subproblems stated in Chapter 1 under the heading Statement of the Research Problem appear to be broad in nature. To clarify the subproblems this study attempted to investigate the following specific subproblems:

1. What are the sources and allocation of private

funds at the school district and school level?

a) What are the extent, sources, and allocations of private funds at the school district and school level?

b) How does British Columbia´s private funding practices compare to those of Alberta?

2. What are the components of school district level and school level private funding practices?

a) How do school district types, based on enrolment size, differ in their private funding practices?

b) How does policy affect private funding?

c) How do school types, based on grade level, differ in their private funding practices?

d) How cost-beneficial is private funding at the school level?

3. What are the major issues in private funding for public education?

a) What are superintendents´ and principals´ opinions regarding major issues in private funding for public education?

4. What are effective practices for private funding for public education?

a) What are superintendents´ and principals´ opinions regarding effective private funding practices for public education?

Definition of Terms

Adopt-a-school programs. A school program which is supported with the resources of a corporation, business, or community group.

Charitable foundation. An entity that has been established separate from an organization or institution, to support that organization or institution.

Charitable organization or association. Devotes it resources to its own charitable activities.

Effective private funding practices. Includes effective public relations networks, fund raising programs, and foundation (or tax status) practices. Takes into consideration the elements of private support.

Funding allocations. The areas to which private funds are distributed or expended.

Funding sources. The areas where private funds originated or are obtained.

Fund raising. Organized programs or campaigns under the direction of those who will raise private funds and spend the funds as they see fit.

Non-monetary. Donated items such as equipment and goods where a cash value can be estimated.

Philanthropy. The affection for mankind shown through acts of donating money, goods, time, or knowledge to people or groups of people for socially useful purposes. Donors may be individuals, corporations, businesses, or groups of individuals, excluding governmental agencies and granting programs.

Private funds. Monetary and non-monetary resources whose sources are of a non-governmental nature.

Private support. Includes all contributions in terms of philanthropic funds and voluntary support.

Public relations. The effort to promote good will between an organization or an institution and its clients, employees, and the public at large.

Scholarships. An award made to students for outstanding academic or athletic achievement. It is used to assist students in their pursuit of an education. It may also take the form of a bursary.

User-fee or service charge. A sum of money paid by an individual using a public service. It covers the purchase of items or the costs incurred in using a public service. In this study the terms "user-fee" and "service charge" are used interchangeably to describe these charges.

Volunteers. Those people or groups of people who contribute time and knowledge for socially useful purposes, without pay.

Notes for Chapter 2

1. Figures for Canada come from the Canadian Directory to Foundations and Granting Agencies (Arlett, 1982) and those for the U.S. come from Tested Ways to Successful Fund Raising (Brakeley Jr., 1980).

2. This land was donated by C.A. Semlin and two ranchers who later demanded rent for it because there was no evidence that the title had been officially transferred (Johnson, 1964).

3. There are more case studies in the literature, however the sampling of studies selected reflects the learning opportunities that are provided by fund raising activities mentioned in other case studies.

4. Scholarship formula was provided by Al Frisk, B.C. Ministry of Education, in a telephone conversation on November 19, 1985.

5. Known as "user charge", "co-payments", "deterrent fees", "balanced billing", "extra-billing", "utilization fees" or "authorized patient charges" (Badgley, & Smith, 1979). In this thesis, a distinction is not made between the terms "user-fees" and "service charges" (see Definition of Terms in Chapter 2).

CHAPTER 3

RESEARCH METHODOLOGY

Introduction

This chapter describes the data required and the instrumentation used to collect the data for this study. The population and sampling process used is then developed. Intended, actual, and atypical samples, and response rates to survey and questionnaire items are also outlined. An explanation is given as to how the data was analyzed and extrapolated, followed by a summary on the research methodology. The chapter ends with an outline of the limitations, delimitations, and assumptions of this study.

Data Required

To research the problem and subproblems it was necessary to obtain demographic data for schools and districts, and data on the sources and allocation of private funds at the school and district levels. Information was sought on those components related to school level and district level private funding practices, and on superintendents′ and principals′ opinions relating to school and district involvement in private funding.

Instrumentation

Three instruments were used and piloted for this study. A school district level survey and a school level survey were used to gather the data needed to investigate the subproblems. A questionnaire elicited general responses from superintendents and principals regarding school and district involvement in private funding. It should be noted that interviews were held with four respondents from the actual sample to assess the information supplied on the questionnaire and to determine if indepth interviews would be required to obtain further data.

This study's instruments were approved by the Simon Fraser University Ethics Review Committee.

School Level Survey

The school level survey used in this study, entitled Survey on Private Funding for Public Education at the School Level (see Appendix B), was an adaptation of a survey used by the Alberta Teachers' Association (ATA) (see Appendix C). The ATA survey was used in October-November 1983 to:

> ...undertake a province-wide survey to determine to what extent curricular programs and extra-curricular activities are supported through school-based fund-raising projects and activities (Alberta Teachers´ Association, 1984, p. 1).

The survey was designed by the Association´s staff, with the assistance of several Alberta school principals. The areas probed sought school level 1982/83 demographic data, sources of private funds in dollars, and allocation of private funds by percent.

Some of the items in the ATA survey were not applicable for use in British Columbian schools and were omitted. Additional areas were probed so the subproblems of this study could be investigated. Items to probe, terminology to use, and phrasing of questions and statements were developed with the assistance of three school district officials, five school principals, and three vice-principals.

The result was a survey which probed five areas: 1) demographic information; 2) sources of private funds; 3) allocation of private funds; 4) school charitable donation status; and 5) personnel information related to private funding. All information to be supplied was for the 1983/84 school year.

Piloting of the School Level Survey. Piloting of the school level survey was done with one secondary principal, one senior secondary vice-principal, and three elementary principals. One elementary principal and the secondary principal were asked to review the survey to assess the feasibility of obtaining the information. The two principals felt that the information would be on file or could be estimated if not on file. At this stage minor changes were made to the phrasing of statements in the personnel section so there would not be any ambiguity concerning the information being sought. The other two principals and the vice-principal piloted the survey in order to assess the amount of time it would take to complete. The elementary principals took an average of 45 minutes to complete the survey and the senior secondary vice-principal 60 minutes. In all three cases records were available regarding the sources and allocation of private funds, grade enrolment, and scholarship data. Estimates had to be made in the personnel section and in that dealing with the population of the school's catchment area. The term "ball park figure" was inserted to describe the figure being requested as an estimate for the catchment area.

School District Level Survey

The school district level survey used in this study, entitled Survey on Private Funding for Public Education at the District Level (see Appendix D), was developed with the assistance of a school district accountant and a school district researcher. They also assisted in identifying the terminology and classifications to be used.

The result was a survey which probed four areas: 1) demographic information; 2) district charitable donation status; 3) sources of private funds; and 4) allocations of private funds. All information to be supplied was for the 1983/84 school year.

Piloting of the School District Level Survey. Piloting of the school district level survey was done with a school district treasurer and a school district accountant. The two employees took time to review the survey and stated that, except for the question dealing with the population of the catchment area, records were available for all information. (They felt the catchment area figure could be estimated.) Due to time constraints these employees were unable to pilot the survey. However, they each stated that the survey would take them an hour to complete.

Principal and Superintendent Questionnaire

The questionnaire used in this study, entitled Principal and Superintendent Questionnaire (see Appendix E), was developed with the assistance of a superintendent and three principals. The administrators were asked to express their concerns with private funding in public education and if they would prefer completing either a qualitative or quantitative questionnaire. There was agreement among the administrators that a quantitative questionnaire would be quicker to complete, but that a qualitative one would allow them to express their views more freely. As a result, a qualitative questionnaire was developed to probe the opinions of superintendents and principals regarding the benefits and disadvantages of school districts and schools being involved in private funding. Their views were also sought on the issue of having "user-fees" or "service charges" in the public education system.

Piloting of the Questionnaire. The piloting of the questionnaire was successfully completed with a senior secondary vice-principal, a secondary principal, two elementary principals, and one superintendent. The questionnaire took on the average 15 minutes to complete. No changes were made to its format.

Population and Sample

The Population

The population for this study was i) B.C. school districts and schools in the 1983/84 school year and ii) all principals and superintendents in the province during the time this study was conducted.

The Purposive Sample

School District Purposive Sample. The school district sample reflected all school districts in the province for the 1983/84 school year. Districts were chosen based upon five characteristics. Four of these were based upon a stratification of:

1. School district economic status (average family income according to the 1981 Census).
2. School district unemployment status (total population 15 years and over unemployed according to the 1981 Census and federal regional unemployment rate in December 1983).
3. School district education status (total population 15 years and over with a Bachelor´s degree or higher according to the 1981 Census).
4. School district size (actual student enrolment as of

September 30, 1983).

The fifth characteristic was based upon geographic location:

5. School district regional location (according to the British Columbia Teachers Federation (BCTF)).

Economic and unemployment status were considered because philanthropic literature (Brakeley Jr., 1980) suggests that regions with low unemployment and high income, that is disposable income, have an advantage in securing funds. The literature further shows that 80% of private funding in Canada comes from individual contributions as opposed to corporations and foundations (Arlett, 1982); and that giving is made possible through, and is dependent upon, private wealth and earnings (Brakeley Jr., 1980). Thus, taking economic and unemployment status into consideration reduces the possibility that a high, or lack of, disposable income in a particular school district would bias the findings of the study.

Education status was considered because the literature on fund raising suggests that schools can benefit financially from those groups of people most closely associated with them (Bronzan, 1970). This group may contribute more of their income to their "alma mater" and local neighbourhood school than those people with less education. Thus, taking education status into consideration reduces the possibility that a school district having a population with a high or low level of education status would bias the findings of the study.

Ranges of economic, unemployment, and education status were determined by placing districts´ statistics on scattergrams. The sampling used in this study incorporated only those school districts falling in the medium ranges. This was done in order to establish a provincial norm (see Table 1 for the ranges).

School districts´ statistics dealing with student enrolment were also placed on a scattergram in order to determine size ranges. Districts with high and low ranges were excluded from the sample because their size was not representative of the provincial school districts and inclusion would bias the findings of the study. Table 1 shows the ranges for district size.

The scattergram dealing with school district size (actual student enrolment) (Note 1) showed seven clusters of school district types. These types were then classified "A" through "G". Table 2 shows the enrolment range for each district type. (For example, district type A has an enrolment range from zero to 800.) The number of districts falling into each district type was then determined (school districts with high and low ranges were included). It was then determined that a proportional representation of district types for the sample could be achieved using the ratio 1:6 (sampled district type

Table 1

Range of Economic Status, Unemployment Status, and Size[e] for B.C. School Districts

Status and Enrolment	High	Medium	Low
Economic Status[a]	$35,000+	$34,999 to $20,000	$19,999 to $0.00
Unemployment Status (1981 Census)[b]	10.50%+	10.49% to 5.01%	5.00% to 0.00%
(December 1983)[c]	17.00%+	16.99% to 10.00%	9.99% to 0.00%
Education Status[d]	9.11%+	9.10% to 4.01%	4.00% to 0.00%
Size[e] (Enrolment)	40,000+	39,999 to 500	499 to 0

[a] Average family income in 1981 (Ministry of Industry and Small Business Development, 1984).

[b] Total population 15 years and over, unemployed in 1981 (Ministry of Industry and Small Business Development, 1984).

[c] Federal region unemployment rate in December 1983 (Statistics Canada, 1984).

[d] Total population 15 years and over with a Bachelor's degree or higher in 1981 (Ministry of Industry and Small Business Development, 1984).

[e] Actual student enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

Table 2

Size (Enrolment) and Number of Each District Type

District Type	Size (Enrolment)[a]	Number of Districts in Each Type[a]	Number of Types in Sample
A	0 - 800	6	1
B	801 - 2,500	22	4
C	2,501 - 6,100	23	4
D	6,101 - 9,000	9	2
E	9,001 - 15,000	4	1
F	15,001 - 21,000	7	1
G	21,001 +	4	1

[a] Based upon actual student enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

to provincial district type). Where the ratio was greater or lesser than 1:6, as in district types D and F, the number of school districts to be sampled was rounded off (see Table 2 on page 61).

To aid in the sampling, one school district was chosen from each of the 12 BCTF school district regions (British Columbia Teachers Federation, n.d.) in order to achieve a geographic distribution of school districts for the province. Table 3 shows the number of district types in each region. Accordingly, a rationale can be made for using student enrolment to classify school districts. The larger district types can be described as having urban characteristics and the smaller types as having rural characteristics. The larger size districts (types F and G) make up approximately 50% of the provincial student enrolment, with the majority of these districts falling into the Greater Vancouver region. This region constitutes approximately 37% of the provincial student enrolment (see Table 3).

After reaching this stage of the sampling process, the following criteria were used to select school districts:

1. School districts having medium economic, unemployment, and education status.
2. School districts having medium size (student enrolment).
3. At least one district type from each of the 12 BCTF

Table 3

Number of District Types in Each District Region and Percent of Provincial Enrolment in Each Region and District Type[a]

District Region	District Types A	B	C	D	E	F	G	Total Districts in Each Type	Enrolment of Regions in Percent[a]
East Kootenay		4	2					6	3.15
West Kootenay		2	3					5	2.58
South Coast	1		3					4	2.02
North Coast	1	1	3					5	2.96
Peace River	1	1	2					4	2.63
Okanagan	2	5	2	1		1		11	8.95
Mainline-Coast		4			1	1		6	6.56
Fraser Valley	1	1	1	2	2			7	9.74
Northern Interior		1	3			1		5	6.87
Vancouver Island South		2		3	1		1	7	11.73
Vancouver Island North		1	2	3				6	5.66
Greater Vancouver			2			4	3	9	37.14
Number of Districts in Each Type	6	22	23	9	4	7	4	75	
Enrolment of District Types in Percent[a]	0.73	6.62	19.43	13.21	9.50	24.79	25.72		100 ±0.01

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[a] Based upon actual student enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

school district regions.

4. A proportional representation of school district types based on the ratio 1:6 (sampled district type to provincial district type).

It should be noted that due to the number of district types required for the sample two school districts had to be selected in some school district regions.

School Purposive Sample. The school sample reflected all schools in the province for the 1983/84 school year. Schools were chosen based upon a stratification of:

1. School grade level (on September 30, 1983).
2. School size (student enrolment on September 30, 1983).

Grade level was considered in order to achieve a representation of schools based on grade level enrolment. Schools were classified into five types: elementary (Elem.), elementary-secondary (Elem./Sec.), junior secondary (Jr.Sec.), senior secondary (Sr.Sec.), and secondary (Sec.). Table 4 shows the grade levels of each school type.

School size, according to student enrolment, was considered in order to achieve a representation of schools based upon student enrolment. Scattergrams of student enrolment in each school type showed clusters of subtypes. Five subtypes were evident in the elementary school type and three in each of the types enrolling secondary school

Table 4

Range of Enrolment[a] and Grade Level[a] by School Type and School Subtype

School Type	School Subtype	Grade Level	Range of Enrolment
Elem.	1	K - 7	0 - 100
	2		101 - 200
	3		201 - 300
	4		301 - 400
	5		401 +
Jr.Sec.	s	8 - 10	0 - 350
	m		351 - 700
	l		701 +
Sr.Sec.	s	11 - 12[b]	0 - 500
	m		501 - 800
	l		801 +
Sec.	s	8 - 12	0 - 400
	m		401 - 900
	l		901 +
El./Sec.	s	any combination of elementary and secondary	0 - 100
	m		101 - 300
	l		301 +

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[a] Based on enrolment and grade level on September 30, 1983 (B.C. Ministry of Education, 1983b).

[b] According to the Principal's Report of Enrolment: September 30, 1983 (B.C. Ministry of Education, 1983b) there are senior secondary schools that enrol grade 10 students. These particular schools would fall into the Sr.Sec. type category.

students (grades 8 to 12) (El./Sec., Jr.Sec., Sr.Sec., and Sec.). The five Elem. subtypes were classified "1" through "5". (For example, Elem. 2 would have an enrolment from 101 to 200 students.) El./Sec., Jr.Sec, Sr.Sec., and Sec. subtypes were classified by small (s), medium (m), and large (l). (For example, a medium junior secondary school would have an enrolment from 351 to 700 students.) Table 4 (page 65) shows the school types, the subtypes, and the range of student enrolment in each subtype. It was decided that as many medium or Elem. 3 subtypes would be sampled because they would be representative of the norm.

The number and types of schools selected for the sample were calculated based upon provincial school type enrolments. Table 5 shows the student enrolment by school types along with percentage figues. From these percentage figures a school type enrolment ratio of 57:6:10:4:23(Elem. : El./Sec.: Jr.Sec. : Sr.Sec. : Sec.) (see Table 5) was established. This ratio was used to determine the school type enrolments necessary to achieve a school sample which would be proportional to that of provincial school type enrolments. Table 5 also shows that the number of "Other" types of schools (alternative programs in alternative facilities) did not need to be sampled because these schools constituted only 0.09% of the provincial enrolment and therefore would not affect the results.

Table 5

Number of Schools, Enrolment, and Percent of Enrolment by School Type for the Province - 1983/84

School Type	Number of School Types[a]	Actual Student Enrolment[a]	Percent of Actual Enrolment	Percent of Actual Enrolment (Enrolment Ratio)[c]
Elem.	1,200	284,683	57.24	57.30 (57)
El./Sec.	101	Elem.=11,693 Sec. =16,292	2.35 3.28	2.35 3.28 (6)
Jr.Sec.	95	51,101	10.28	10.29 (10)
Sr.Sec.	20	18,881	3.80	3.80 (4)
Sec.	166	114,193	22.96	22.98 (23)
Subtotal	1,582	496,843	99.91	100.00 (100)
Others[b]	18	469	0.09	N/A
Total	1,600	497,312	100.00	100.00 (100)

[a] As of September 30, 1983 (B.C. Ministry of Education, 1983b).

[b] "Others includes alternative programs, alternative facilities (B.C. Ministry of Education, 1983b).

[c] Excludes "Others".

It was decided that to report with confidence on the results of this study it would be necessary to achieve a sample representative of between 4% and 5% of the student enrolments in each school type for the province. Table 5 (page 67) further suggests that in using this representative sample, together with the school type enrolment ratio, only one of the 20 senior secondary schools would need to be selected. This was considered inadequate for the purposes of the study, therefore three senior secondary schools were selected.

It was also decided that one elementary type school and one school type enrolling secondary students (grades 8 to 12) (El./Sec., Jr.Sec., Sr.Sec., or Sec.) would be selected from each of the districts sampled. By doing this, one elementary school and one school type enrolling secondary students would be represented in each district. In order that school types within a district would be further representative, school types were proportionally sampled. In other words, if a school district contained a large number of a particular school type that type was selected.

After reaching this stage of the sampling process the following criteria were used to select schools:

1. One elementary school and one school type enrolling secondary students (El./Sec., Jr.Sec., Sr.Sec., Sec.) would be selected in each of the school districts

sampled.

2. Schools would be selected in order to achieve, as closely as possible, a sample of between 4% and 5% of the provincial enrolment in each school type and the school type enrolment ratio (57:6:10:4:23).

3. In the case of senior secondary schools (Sr.Sec.), three would be sampled.

4. "Other" types of schools (alternative programs, alternative facilities (B.C. Ministry of Education, 1983b)) would be eliminated from the sample.

5. School types within school districts would be proportionally sampled; that is a school district with a larger number of one particular school type would have that type selected.

6. As many subtypes as possible would be sampled. If a subtype had to be eliminated, then the smaller or larger subtypes, or Elem. 1, 2, 4, 5 subtypes would be eliminated first and as many medium or Elem. 3 subtypes would be selected.

Superintendent and Principal Purposive Sample. The superintendent and principal sample used in this study was reflective of all superintendents and principals in the province of B.C. during the period September through November, 1984. Superintendents and principals were chosen from the school and school district sample.

The sample of school districts, schools, superintendents, and principals is therefore a purposive sample of the population.

Intended Sample

Intended School District Sample

Using the school district sampling criteria (pages 62 and 64), the intended district sample included one district from type A, four from B, four from C, two from D, and one from each of types E, F, and G (see Table 2 on page 61). Thus, the intended sample constituted 14 school districts totaling 101,000 students or 20.31% of the provincial enrolment.

Replacement School Districts. Two weeks after the surveys and questionnaires were mailed school districts began to acknowledge their participation in this study. Districts that declined or did not acknowledge their participation were replaced with other districts in their respective types. Hence, one replacement district was chosen for each A and E type, seven for type C, and three for type F. (All seven school districts in type F were exhausted. Three districts did not meet the sampling criteria because they had high or low economic, unemployment, or education status.) The result was that in addition to the original

14 districts selected for this sample, 12 more were selected as replacement districts based on the purposive sampling process.

Intended School Sample

The schools were selected from the intended school district sample (the original 14 districts sampled) using the school sampling criteria (pages 68 and 69).

Due to the large number of elementary and elementary-secondary schools with an enrolment under 50 which showed up in the district sample, it was apparent that their numbers could distort achievement of the school type enrolment ratio. However, upon further examination it was found that if these school types with an enrolment under 50 were eliminated then a ratio approximating the school type enrolment ratio would be achieved.

Table 6 shows the school sample which included 61 elementary, five elementary-secondary, four junior secondary, three senior secondary, and eight secondary schools. According to the Table, the school sample achieved between a 4% and 5% sample of student enrolment for the province by school types. In the case of senior secondary schools, their percentage figure is higher because of the three schools needed to meet the school sampling criteria. Thus, this is a

Table 6

Intended School Sample by Subtype and Type in the Intended District Sample: School Type Enrolments and Their Provincial Percentages[a]

School Type	School Subtype	School Sample by Subtype[b]	School Sample by Type	School Type Enrolment of Sample[c]	Percent of Provincial School Type Enrolment	Percent of Provincial Enrolment of the Sample	School Type Enrolment Ratio of Sample[a]
Elem.	1 2 3 4 5	10 15 17 10 9	61	12,500	4.40	4.79 (4.41)[d]	56.85
El./Sec.	s m l	1 2 2	5	1,200 Elem. = 500 Sec. = 700	4.28 4.28		5.40
Jr.Sec.	s m l	0 3 1	4	2,300	4.45		10.62
Sr.Sec.	s m l	0 1 2	3[c]	2,700	14.06		3.86[d]
Sec.	s m l	1 5 2	8	5,100	4.44		23.28

Table 6 (Continued)

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[a] All enrolment figures are based on the actual student enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

[b] Schools under an enrolment of 50 were eliminated.

[c] More Sr.Sec. schools were chosen than the school type enrolment ratio required.

[d] This figure is based on a Sr.Sec. enrolment of 850 students or 4.50% of the student Sr.Sec. provincial enrolment. A school with this enrolment does not exist in the sample.

[e] School enrolments in the sample were rounded off to the hundredth place in order to protect the anonymity of the respondents.

sample of 81 schools with approximately 23,8000 students or 4.79% of the provincial enrolment.

Replacement Schools. In addition to the 81 schools sampled, 25 elementary, one elementary-secondary, two junior secondary, two senior secondary, and two secondary schools were selected from the intended district sample as replacement schools. This was done in anticipation that some schools would be unable to supply the necessary information due to changes in school administration. The number of schools in the replacement districts totaled 84 (61 elementary, five elementary-secondary, five junior secondary, six senior secondary, and seven secondary) and were selected using the sampling process. Schools in participating districts which declined to take part in the survey were substituted with replacement schools of the same type from that district, or another district, until all schools of that type were exhausted.

Intended Superintendent and Principal Sample and Replacements

The 14 superintendents and 81 principals sampled for this study were selected according to the school district and school sampling process and therefore came from the sampled districts and schools. Replacement superintendents and principals were used from the replacement districts and schools.

Actual Sample

Actual School District Sample

From the intended school district sample, responses were received from nine districts and six replacement districts. Table 7 shows the response rate. Following up on the non-respondents, one district reported that it would only participate in research dealing with pedagogical studies. One school district would not participate and would not give a reason. Two others felt the information being sought was not accessible and hence could not be reported with any accuracy. The remaining seven districts felt they could not provide the information due to a lack of, or cutbacks in, staff (Note 2).

No F type districts responded to the survey. Since all districts in type F were exhausted, the original district types (A through G) had their size (enrolment) ranges adjusted in order to meet the sampling criterion of having one district type represented in the sample. District types A, B, and C remained the same for the actual sample, while types D through G of the intended sample were adjusted into three groupings for the actual sample. Table 8 shows the six district types (A through F) of the actual sample along with the adjusted enrolment ranges and number of districts in each type. It was found that the ratio 1:6 (sampled district type

Table 7

District Level Survey Response Rate

Item	Intended District Sample	Replacement Districts	Total
Sampled	14	12	26
Non-response	5[a]	6	11[a]
Response (Percent)	9 (64.29)	6 (50.00)	15 (57.69)
Used in Actual District Sample	9	4	13
Not Used in Actual District Sample		2	2

[a] One school district did not respond to the survey; however, the schools in that district did respond to the School Level Survey.

Table 8

Enrolment and Number of Each District Type in the Actual Sample

District Type	Size (Enrolment)[a]	Number of Districts in Each Type[a]	Number of District Types in Actual Sample
A	0 - 800	6	1
B	801 - 2,500	22	4
C	2,501 - 6,100	23	4
D	6,101 - 10,000	10	2
E	10,001 - 18,000	7	1
F	18,001 +	7	1

[a] Based on enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

to provincial district type) would still give a proportional representation of the adjusted district types in the actual sample.

Table 9 shows the distribution of student enrolment in each district region and district type (A through F) of the actual sample. The rationale for using student enrolment as an indicator of larger districts having urban characteristics and smaller districts having rural characteristics still held. The actual sample showed that the largest district type (F) makes up 37% of the student enrolment with the majority of these districts falling within the Greater Vancouver region. This region constituted approximately 37% of the student enrolment.

The actual district sample had four districts from types B and C, two from D, and one from each of A, E, and F (Note 3). All of the districts met the sampling criteria and Table 10 shows the distribution of the district types by region. Thus the actual sample included 13 districts, or 17.33% of the provincial school districts with an enrolment of 76,000 students or 15.28% of that for the province.

Actual School Sample

An adjustment was also made to the school sample so that it would meet the school sampling criteria. This was

Table 9

Number of District Types in Each District Region and Percent of Provincial Enrolment in Each Region and District Type of the Actual Sample[a]

District Region	District Types						Total Districts in Each Type	Enrolment of Regions in Percent
	A	B	C	D	E	F		
East Kootenay		4	2				6	3.15
West Kootenay		2	3				5	2.58
South Coast	1		3				4	2.02
North Coast	1	1	3				5	2.96
Peace River	1	1	2				4	2.63
Okanagan	2	5	2	1	1		11	8.95
Mainline-Coast		4		1	1		6	6.56
Fraser Valley	1	1	1	2	2		7	9.74
Northern Interior		1	3			1	5	6.87
Vancouver Island South		2		3	1	1	7	11.73
Vancouver Island North		1	2	3			6	5.66
Greater Vancouver			2		2	5	9	37.14
Number of Districts in Each Type	6	22	23	10	7	7	75	
Enrolment of District Types in Percent	0.73	6.62	19.43	15.03	21.02	37.17		100 ±0.01

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[a] Based on enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

Table 10

Distribution of District Types by Region in the Actual Sample[a]

District Type	District Regions											
	1	2	3	4	5	6	7	8	9	10	11	12
A											X	
B	X	X	X	X								
C					X	X	X	X				
D									X	X		
E											X	
F												X

[a] To protect the anonymity of the respondents, there is no relationship between the regions' names and the numbers representing each region in this table.

necessary because of the large number of elementary subtype 5 schools and the small number of elementary subtypes 1 and 2 schools. Hence, only 48 elementary schools needed to be selected in order to achieve the school type enrolment ratio and between 4% and 5% of the provincial school type enrolments. In other school types, the number of schools to be selected was the same as in the intended school sample. Table 11 shows the best possible selection of school types from the actual district sample in order to meet the sampling criteria.

Not all schools from the school sample in the actual district sample responded to the school level survey. However, by using replacement schools in the actual district sample and schools from other responding districts, an actual school sample was formed. Table 12 shows the response rate of the schools sampled for this study and the short fall of two elementary-secondary types. All schools of this type were sampled in the actual district sample and replacement districts.

Following up on the 47 non-respondents, 11 principals reported that they could not provide the information because they were new to their schools. Another 15 felt that neither they nor their school staffs could afford the time to go through the school accounting books to secure the required information. The remaining 21 principals did not give a

Table 11

School Sample by Subtype and Type in the Actual District Sample: School Enrolments and Their Provincial Percentages[a]

School Type	School Subtype	School Sample by Subtype[b]	School Sample by Type	School Type Enrolment of Sample[c]	Percent of Provincial School Type Enrolment	Percent of Provincial Enrolment of the Sample	School Type Enrolment Ratio of Sample[a]
Elem.	1	4	48	12,500	4.40	4.79 (4.41)[d]	56.83
	2	10					
	3	14					
	4	12					
	5	8					
El./Sec.	s	1	5	1,200 Elem. = 500 Sec. = 700	4.28 4.28		5.53
	m	3					
	l	1					
Jr.Sec.	s	0	4	2,300	4.45		10.48
	m	2					
	l	2					
Sr.Sec.	s	0	3	2,700	14.06		3.85[d]
	m	2					
	l	1					
Sec.	s	1	8	5,100	4.44		23.31
	m	5					
	l	2					

Table 11 (Continued)

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[a] All enrolment figures are based on the actual student enrolment on September 30, 1983 (B.C. Ministry of Education, 1983b).

[b] Schools under an enrolment of 50 were eliminated.

[c] More Sr.Sec. schools were chosen than the school type enrolment ratio required.

[d] This figure is based on a Sr.Sec. enrolment of 850 students or 4.50% of the student Sr.Sec. provincial enrolment. A school with this enrolment does not exist in the sample.

[e] School enrolments in the sample were rounded off to the hundredth place in order to protect the anonymity of the respondents.

Table 12

School Level Response Rate

Item/ Response/ Percent	School Type					
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	Total
Intended Schools in Actual District Sample	48	5	4	3	8	68
Response	34	2	3	2	4	45
Percent	70.83	40.00	75.00	66.67	50.00	66.18
Replacement Schools in Actual District Sample	11	6	1	1	4	23
Response	1	0	0	0	1	2
Percent	9.09	0.00	0.00	0.00	25.00	8.70
Replacement Schools in Other Districts	17	1	4	1	3	26
Response	16	1	2	1	3	23
Percent	94.12	100.00	50.00	100.00	100.00	88.46
Total	76	12	9	5	15	117
Response	51	3	5	3	8	70
Percent	67.11	25.00	55.56	60.00	53.33	59.83

reason or were not heard from.

Table 13 shows the number of schools used from the actual district sample and from the replacement districts which together form the actual school sample.

Table 14 provides a breakdown of the student enrolment by school type for the actual sample.

The actual school sample met most criteria and the following results were achieved:

1. A sample of between 4% and 5% of the provincial enrolment. As explained earlier, there was a short-fall of two elementary-secondary schools. Accordingly, instead of the desired provincial enrolment of 4.28% for this school type, only an enrolment of 2.78% was achieved. The school type enrolment ratio was approximately 59:3:11:4:23 (Elem. : El./Sec. : Jr.Sec. : Sr.Sec. : Sec.) instead of the intended enrolment ratio of 57:6:10:4:23.
2. Three senior secondary schools were sampled.
3. Elementary and elementary-secondary subtypes having an enrolment under 50 were not sampled, neither were schools with alternative programs in alternative facilities.
4. School types within districts were proportionally sampled.
5. As many subtypes as possible were sampled with the

Table 13

Actual School Sample

Item/ Percent	School Type					
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	Total
Schools Used From Actual District Sample	35	2	3	2	5	47
Percent of Schools in Actual Sample	72.92	66.67	75.00	66.67	62.50	71.21
Schools Used From Other Districts	13	1	1	1	3	19
Percent of Schools in Actual Sample	27.08	33.33	25.00	33.33	37.50	28.79
Actual School Sample	48	3	4	3	8	66
Replacement Schools not used	3	0	1	0	0	4

Table 14

Actual School Sample Enrolment Statistics *vs* Provincial 1983/84 Enrolment Statistics

School Type	School Subtype	School Sample by Subtype (Type)	Sample of Enrolment[a,b]	Provincial Enrolment[b]	Sample Enrolment as a Percent of Provincial Enrolment	School Type Enrolment Ratio of Sample[e]
Elem.	1 2 3 4 5	8 5 13 (48) 12 10	13,200	284,312	4.63	58.83
El./Sec.	s m l	0 2 (3) 1	800 Elem. = 300 Sec. = 500	11,693 16,292 (27,985)	2.22 3.18 (2.78)	3.47
Jr.Sec.	s m l	0 3 (4) 1	2,500	51,101	4.91	11.23
Sr.Sec.	s m l	0 1 (3) 2	2,800	18,881	14.93	3.80[d]
Sec.	s m l	1 6 (8) 1	5,100	114,193	4.44	22.67
Total		66 (66)	24,300	496,843[c]	4.90 (4.50)[d]	100.00

Table 14 (Continued)

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[a] To protect the anonymity of the respondents, all sample enrolment figures have been rounded off to the nearest hundredth place.

[b] Based on enrolment on September 30, 1983 as reported to the B.C. Ministry of Education (1983b).

[c] Excludes students in alternative programs and facilities.

[d] This figure is based on a Sr.Sec. enrolment of 850 or 4.50% of the student Sr.Sec provincial enrolment. A school with this enrolment does not exist in the sample.

[e] Based on the actual student enrolment of the sample.

majority of schools coming from the medium and Elem. 3 subtypes.

6. In the actual sample it was not possible to sample a school enrolling secondary students (El./Sec., Jr.Sec., Sr.Sec., or Sec.) from each district. This was because some of the school districts had only one of these schools and some of these did not respond to the survey. This happened in three cases. In these situations three other schools of the same type were chosen from replacement districts having similar urban or rural characteristics. In other words, these three schools were from type B districts and were replaced by schools of the same type in replacement type C districts.

In summary, the actual school sample included 48 elementary, three elementary-secondary, four junior secondary, three senior secondary, and eight secondary schools, or 4.17% of the provincial schools of these school types. The student enrolment of the actual school sample totaled 24,300 students or 4.90% of the provincial enrolment in these school types.

Actual Superintendent and Principal Sample

The superintendents and principals sampled for this study were from responding school districts and schools. Thirteen superintendents′ responses were used, with 11 of them coming from the actual district sample and two from the replacement districts. Sixty-four principals′ responses were used, with 45 of them coming from schools in the actual district sample and 19 from schools in replacement districts.

In followup interviews with one superintendent and three principals, it was determined that no new information could be elicited through further interviews and that the responses given on the questionnaire were satisfactory to carry on with the study.

Atypical Sample

To aid in the examination of this study, one district and three schools were sampled to form an atypical sample. This district and a semi-isolated secondary school within it were accidently sampled. That is, surveys were accidently coded and mailed to this district. This school district is in district types A to C and can be described as having high unemployment, and low economic and education status. The elementary schools in this district were unable to supply the necessary information due to changes in administrative personnel. (No attempt was made to replace these schools.) The secondary school in this district is of the small secondary subtype (enrolment under 400).

Two independent (private) schools from the Greater Vancouver Region were purposively sampled. One school was a church related elementary school and was of subtype 3 (enrolment between 201 and 300). The other independent school was a non-sectarian elementary-secondary school and was of the large subtype (enrolment over 301). These schools completed the same surveys as those sent to the public schools. They were asked to complete the various sections as best as possible according to their accounting systems.

The atypical sample was used to assist in the investigation of private funding practices of the actual sample. The data supplied by the atypical sample was compared with the actual sample results.

Completeness of Response Rate to Survey and Questionnaire Items

Actual Sample

The response rate for the questionnaire has been discussed in the Actual Superintendent and Principal Sample section of this chapter. Thirty-seven of the 66 schools and seven of the 13 school districts did not respond to the survey item dealing with population of their catchment area. Details of the response rate of this item can be found at the end of this chapter under the Delimitations heading (#4 on page 101). The response rate for all other items on the district survey was 100%, while on the school survey it was the same except for those items in the Personnel Section (this section dealt with the amount of time school personnel spent on private funding activities). Table 15 outlines the response rate by school type for the Personnel Section. On the questionnaire, only 55 principals responded to the issue of user-fees or service charges in public education.

Atypical Sample

The atypical district and secondary school responded to every item on both the surveys and the questionnaire. The independent elementary school responded to every item on the survey and questionnaire, except that relating to the population of its catchment area. The independent elementary-secondary school did not respond to the questionnaire nor the item on the survey relating to the population of its catchment area. As well, this school did not respond to items relating to the allocation of funds because it felt

Table 15

Respones Rate by School Type for the Personnel Section

Item	Response Rate Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
Administrators	46	3	3	3	7
Teachers	47	3	2	3	7
Secretaries	47	3	3	2	7
Actual Sample	48	3	4	3	8

this information was confidential. Both independent schools could not respond to the item relating to the population of their respective catchment areas because their schools had no set boundaries.

Data Collection Procedure

In collecting data for this study, the intended and replacement districts and schools were sent the necessary instruments via their superintendents´ offices. (In the case of the two independent schools, the material went directly to the school principals.) The superintendent in each district was sent a letter asking for his/her cooperation as well as that of the schools´. Those superintendents who agreed to participate were asked to complete the questionnaire and district level survey. They were also asked to ensure that the school level surveys and questionnaires reached the appropriate schools. The schools that elected not to participate were replaced by another school within the district or from another district. The principals of these replacement schools were sent a letter stating that their school district was participating in the study and asking if they would not do the same. All material was to be returned in enclosed self addressed postage-paid envelopes.

The material was coded so that districts and schools could be identified by type. Districts and schools that did not acknowledge their participation or non-participation within a week prior to the closing date were sent reminders and surveys. (See Appendix F for correspondence.)

In exchange for a district´s and its schools´ participation, a summary report of the results was sent to the school district office.

Data Analysis

The data obtained from this study required frequency tabulation. The responses to each item of the school and district surveys were tabulated and commented on in the following five ways:

1. Dollar Amount Reported-- This was the dollar amount reported on the surveys (for more detail, see Delimitation #2 on page 102).
2. Per Student-- This was the amount reported on a per student basis. It was computed by taking the enrolment of the school or district type samples and dividing it into the dollar amount reported by each respective type (for more detail, see Delimitation #3 on page 102).
3. Provincial Estimate-- This was the amount

extrapolated from the school district and/or school samples for the province. (See Extrapolation of Results on pages 98 and 99 for details and examples.)

4. Average per Student or Estimated Dollar Amount per Student-- This amount represents the average student in the province. The figure was computed by taking the provincial estimates and dividing them by the required provincial enrolments (Note 4).

5. Percent-- Two percentages were calculated. One was computed for the dollar amount reported on the surveys and the other for the provincial estimates.

The foregoing tabulations were computed by using enrolment figures on September 30, 1985. These figures were used because the change in enrolment over the 1983/84 school year was insignificant. The study shows that the district sample had an increase in full-time equivalent (F.T.E.) enrolment of 0.6% and the school sample had one of 0.2%. Table 16 shows the change in F.T.E. enrolment for the samples from September 30, 1983 to June 28, 1984 (Note 5).

No analysis was attempted on how school types compared in a particular district type. The sampling process did not allow for this type of examination due to the fact that some districts did not have enough schools in them to report such relationships with confidence.

Table 16

Change in F.T.E. Student Enrolment[a] of the School District and School Samples - September 30, 1983[b] *vs* June 28, 1984[c]

Sample Item	F.T.E. Enrolment on September 30, 1983	F.T.E. Enrolment on June 28, 1984	Change in Enrolment Since September 30, 1983[a] (Percent)
School District Sample	72,900	73,300	+400 (+0.6)
School Sample			
Elem.	12,400	12,800	+500 (+3.8)
El./Sec.	700	700	-0 (-2.3)
Jr.Sec.	2,500	2,500	-0 (-0.9)
Sr.Sec.	2,800	2,700	-200 (-5.4)
Sec.	5,100	4,800	-200 (-4.5)
School Sample Total	23,500	23,500	+0 (+0.2)

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[a] To protect the anonymity of the respondents, the enrolment figures have been rounded off to the nearest hundredth place. The percentage figures indicated in this table have been computed using the exact F.T.E. enrolment figures reported by school districts and schools.

[b] Based on the student enrolment reported to the B.C. Ministry of Education for September 30, 1983 (B.C. Ministry of Education, 1983b) by counting Kindergarten students as 0.5 F.T.E..

[c] Based on the enrolment reported by each school and school district in Section A of the surveys.

The responses from each item of the questionnaire were classified as superintendents' and principals' responses. Each concern or response which was raised in the three questions of the questionnaire was recorded according to the frequency with which it appeared in each classification of respondents; the higher the frequency, the more important the concern or issue was considered to be (Note 6).

Extrapolation of Results

The results of this study were extrapolated for the total B.C. population from data supplied by the 13 school districts and/or 66 schools (48 elementary, three elementary-secondary, four junior secondary, three senior secondary, and eight secondary) of the actual sample.

Provincial estimates for school types were computed by multiplying each per student amount (calculated in each school type) by the provincial enrolment in that school type. For example, the secondary schools reported collecting a total of $0.75 per student in gifts. Therefore, since there were 114,193 students enrolled in secondary schools in 1983/84, the total provincial estimated amount in gifts coming from secondary schools was 114,193 x $0.75 = $85,645 (see Tables 30 and 31 on pages 137 and 139).

To calculate the estimated provincial gift amount coming from all school types, the sum of each school type was taken. For example, elementary was $515,276, elementary-secondary $90,112, junior secondary $3,066, senior secondary $0.00, and secondary $85,645. The total estimated provincial gift amount was therefore $694,099 (see Table 30 on page 137).

At the school district level, the provincial estimate for any one item was computed by multiplying the calculated per student dollar amount in the item with the provincial student enrolment. For example, all districts reported collecting a $0.31 per student from foundations. Since there were 497,312 students enrolled in the B.C. public school system in 1983/84, the provincial estimated amount collected at the district level from foundations was $154,167 (see Table 18 on page 111).

The subtotals or total provincial estimates were the sum of any of these calculations.

Summary

This chapter has reviewed the research methodology employed in this study. Data required and the instuments used were outlined. Intended, actual, and atypical samples, and response rates were also discussed. The data collection procedure and analysis were then outlined.

Results for this study were extrapolated for the total

B.C. population of schools and school districts from data supplied by 13 school districts and 66 schools(48 elementary, three elementary-secondary, four junior secondary, three senior secondary, and eight secondary). Districts and schools were selected using a purposive sampling process. School districts were chosen on the basis of regional location, enrolment size, and economic, unemployment and education status. Schools were chosen on the basis of enrolment size and grade level. The district sample constituted 17.33% of the provincial school districts. It has an enrolment of 76,000 students or 15.28% of the provincial enrolment. The school sample constituted 4.17% of the provincial schools. It has an enrolment of 24,300 students or 4.90% of the provincial enrolment.

The results were also based on the responses of 13 superintendents and 64 school principals. To aid in the investigation of this study, one atypical school district and three atypical schools (one public secondary and two independent schools) were sampled.

The results are not exact figures for the amount of private funds brought into the B.C. school system in 1983/84, nor for how they were spent. They must be viewed only as general indicators as to where the private funds originated and how they were spent. The responses by superintendents and principals must be viewed as being general in regard to the major issues in, and effective practices for, private funding for public education.

Limitations, Delimitations, and Assumptions

Limitations

1. Schools were unable to supply the exact dollar amount coming from B.C. government scholarships because the information was not known at the time.
2. School private funding performance in particular school district types could not be compared since the methodology did not allow for such an examination.
3. The data supplied by the respondents is assumed to be valid and correct.
4. Population of catchment areas for schools and school districts was ignored in the analysis of data since the respondents could not supply accurate information that could be reported with confidence. Of the 13 school districts sampled, seven districts did not respond to this question (including those that noted that the information supplied was a "guesstimate"). Of the 66 schools sampled, 37 schools did not respond to this question (including those that noted that the information supplied was a "guesstimate"). It was decided that the guesstimates and the non-respondents could

bias the findings if an attempt was made to use this information in the analysis.

5. Responses on the questionnaire were assessed by holding interviews with four respondents. When the interviews began to indicate that no new information was being supplied, the interviews were discontinued.

Delimitations

1. The enrolment figures reported in this study were rounded off to the nearest hundredth place to protect the anonymity of the respondents.
2. Dollar amounts reported on the survey were rounded off to the nearest dollar.
3. Per student dollar amounts and average per student dollar amounts were calculated to the fourth decimal place.

Assumptions

1. School principals and district superintendents, or their designates, could estimate with accuracy the figures requested if the information could not be supplied from accounting records.
2. Schools and school districts in the province that were not sampled had similar allocations and sources of private

funds as those in the actual sample. Those superintendents and principals not surveyed had similar views, to those in the actual sample, regarding school and district involvement in private funding.

3. There are inherent factors affecting the private funding practices of school districts and schools based on their student enrolments and grade levels.

Notes for Chapter 3

1. In this study when the terms "student enrolment" and "enrolment" are used, they refer to the "actual student enrolment",unless otherwise specified. To protect the anonymity of respondents, the enrolment figures being reported (outside of provincial figures) have been rounded off to the nearest hundredth place. However, calculations requiring enrolment data have been computed using the actual enrolment on September 30, 1983.

2. One district did not respond to the district survey, however the schools in that district participated in the study.

3. Two school districts responding to the survey were not used for this study, however some schools within these districts were used in the school sample.

4. Provincial estimates at the district level are based on a student enrolment of 497,312. Provincial estimates at the school level exclude alternative facilities specializing in alternative programs and therefore, are based on a student enrolment of 496,843.

5. In calculating Full-Time Equivalent enrolments, secondary F.T.E. on September 30, 1983 did not take into consideration adults aged 19+. That is, these students were considered attending school on a full-time basis.

6. Only the most frequent response by superintendents and the two most frequent responses by principals, in each category, will be analyzed and discussed.

CHAPTER 4

RESULTS, ANALYSIS, AND DISCUSSION

Introduction

This chapter examines the question of private funding for B.C. public elementary and secondary education by investigating the four subproblems. First, provincial estimates were extrapolated from the actual sample so as to identify school and district level sources and allocations of private funds. Second, survey data and provincial estimates were examined by school and district types to determine components of private funding practices. The findings from the atypical sample assisted in investigating these components. Third, questionnaire responses by superintendents and principals were used to determine the major issues in private funding and effective private funding practices for public education. Four, private funding practices for the province were assessed by comparing the consistency of superintendents′ and principals′ responses, the findings extrapolated from this study, the funding practices of the atypical sample, and the literature.

Subproblem #1

What are the sources and allocations of private funds at the school district and school level?

Provincial estimates extrapolated from the school and district samples were used to investigate this subproblem. The data analyzed consisted of school district and school level sources of private funds and their allocations. Provincial estimates for the sources and allocation of private funds were then compared with those of the ATA study (Alberta Teachers´ Association, 1984).

Provincial Estimates of the Sources and Allocation of Private Funds

B.C. Sources of Private Funds. The results of this study showed that an estimated $14.8 million or $29.86 per student in private funds was brought in by B.C. schools and districts in 1983/84.

The way in which the provincial estimates were calculated can be shown using the $14.8 million estimate. This amount was arrived at by adding the provincial estimates for school raised funds with those of the district. District raised funds ($989,651; see Table 18 on page 111) were computed by multiplying the calculated per student amounts from each source of the district sample, by the provincial district enrolment of 497,312. The sum of the products was then calculated. School raised funds ($13,844,231; see Tables 25 through 36) were computed by taking the sum of all the provincial estimates for each school type in each item of the survey dealing with the sources of funds. A school type provincial estimate for each source was computed by taking the product of the calculated per student amount and its corresponding provincial school type enrolment (see Table 5 on page 67). The sum of school and district raised funds was found to be $14,833,882. This amount was then divided by the provincial district enrolment of 496,843 to arrive at a provincial average on a per student basis ($29.86).

A breakdown of the sources of funding is shown in Table 17. Districts brought in an estimated $1.0 million (see Table 18). The remainder ($13.8 million) came from schools in the form of student fees, gifts, profits from fund raising activities, privately donated school level scholarships, and other sources such as profits from vending machines, and cafeteria and school sales (see Table 17).

B.C. Allocation of Private Funds. The results of this study showed that the $14.8 million brought into the B.C. public school system was utilized in five main areas (Note 1). An estimated $4.7 million was spent in curricular programs and $5.5 million in extra-curricular programs. A

Table 17

Provincial Estimates of the Sources of Private Funds in 1983/84

Sources of Private Funds	Estimated Dollar Amount (±0.01)	Percent of Total Estimated Dollar Amount (±0.01)	Average per Student Dollar Amount (±0.01)
School Raised Funds			
-Fees			
-Amount Turned Over to Boards	1,012,059	6.82	2.04
-Amount Allocated to School Programs	3,799,598	25.61	7.65
Fee Subtotal	4,811,657	32.44	9.68
-Gifts	694,099	4.68	1.40
-Fund Raising	5,345,397	36.04	10.76
-Other (vending machines, profits from cafeteria and picture sales, etc.)	1,280,766	8.63	2.58
School Subtotal	12,131,919	81.79	24.42
School District Raised Funds			
-Trust Funds, Foundation Grants, gifts from citizens and businesses, etc.	989,651	6.67	1.99

Table 17 (Continued)

Sources of Private Funds	Estimated Dollar Amount (±0.01)	Percent of Total Estimated Dollar Amount (±0.01)	Average per Student Dollar Amount (±0.01)
Scholarships Privately Donated			
(excluding university, government, school board scholarships, and scholarships reported in "school raised funds".)	1,712,312	11.54	3.45
Total	14,833,882	100.00	29.86

Table 18

Provincial Estimates of Private Funding Sources and Dollar Amount Reported at the School District Level in 1983/84

Private Funding Sources	Estimated Dollar Amount (±0.01)	Percent of Total Estimated Dollar Amount (±0.01)	Average per Student Dollar Amount (±0.01)[a]	Dollar Amount Reported
Foundation	154,167	15.58	0.31	23,643
Corporations	29,839	3.02	0.06	4,395
Private Citizens	348,118	35.18	0.70	52,982
Small Business	169,086	17.09	0.34	26,159
Trust Funds	124,328	12.56	0.25	18,850
Others (includes private agencies and associations)	164,113	16.58	0.33	24,846
Total	989,651	100.01	1.99	150,875

[a] These amounts are the same as the "per student dollar amounts".

further $1.0 million from student fees was turned over to school boards for consumable supplies, such as workbooks. An estimated $2.5 million went to scholarships (Note 2) and $1.1 million to other expenses not related to curricular or extra-curricular programs (for example, surplus funds, special projects, or donations made to charitable organizations). A breakdown of how the funds were spent for the province are provided in Table 19. Table 20 illustrates district level allocations.

Comparison of Private Funding Practices of Two Provinces: Alberta Versus B.C.

Comparison of Private Funding Sources for B.C. and Alberta. The ATA study (Alberta Teachers´ Association, 1984) estimated that $11.6 million or $27.58 per student was brought in by Alberta schools (excluding fees rebated to students and turned over to school boards) while this study estimated that B.C. schools brought in $12.8 million or $25.83 per student (excluding fees rebated to students, those turned over to school boards, and school district raised funds; includes privately donated school level scholarships). In Table 21 the sources of funds from both studies are compared on an estimated per student amount and a percentage basis of the total estimated per student amount. The $1.75

Table 19

Provincial Estimates of the Expenditure of Private Funds in 1983/84

Expenditure of Private Funds	Estimated Dollar Amount (±0.01)	Percent of Total Estimated Dollar Amount (±0.01)	Average Per Student (±0.01)
Curricular Programs	4,689,357	31.61	9.44
Extra-curricular Programs	5,482,727	36.96	11.03
Scholarships (Includes privately donated scholarships at the school district and school levels and school raised scholarships such as student council)	2,508,906	16.91	5.05
Amount Turned Over to Boards (for consumable supplies)	1,012,059	6.82	2.04
Other Expenses (including donations and surplus funds)	1,140,832	7.69	2.30
Total	14,833,881	99.99	29.86

Table 20

Provincial Estimates of the Expenditure of, and Dollar Amount Reported in, the Expenditure of School District Private Funds in 1983/84

xpenditure of rivate Funds	Estimated Dollar Amount (±0.01)	Percent of Total Estimated Dollar Amount (±0.01)	Average per Student Dollar Amount (±0.01)	Dollar Amount Reported
urricular Programs	89,516	9.05	0.18	13,220
xtra-curricular Programs	144,220	14.57	0.29	21,963
cholarships	721,102	72.86	1.45	110,358
pecial Projects	34,812	3.52	0.07	5,334
otal	989,650	100.00	1.99	150,875

These amounts are the same as the "per student dollar amounts".

Table 21

Alberta[a] *vs* B.C.[b] Private Funding Sources and Allocations

Item	Alberta Percent[c]	Alberta Per Student[d]	B.C. Percent[c]	B.C. Per Student[d]
SOURCES				
Fees[e]	44.0	12.13	29.6	7.65
Fund Raising	35.6	9.82	41.7	10.76
Gifts/ Donations[f]	7.9	2.17	18.7	4.84
Other Sources[g]	12.5	3.46	10.0	2.58
Total	100.0	27.58	100.0	25.83
ALLOCATIONS				
Curricular Programs	54.2	15.52	35.8	9.26
Extra-curricular Programs	34.1	9.77	41.6	10.74
Other Expenses[h]	11.6	3.32	22.6	5.83
Total	99.9	28.61	100.0	25.83

[a] Based on ATA study done for the 1982/83 school year.

[b] Based on this study's findings for the 1983/84 school year.

[c] Percent of the estimated per student dollar amount (±0.1).

[d] Estimated per student dollar amount (±0.01).

[e] Includes fees collected at the school level and retained for school use.

[f] Includes B.C. privately donated school level scholarships.

[g] Includes school sales, cafeteria profits, picture sales, etcetera.

[h] Includes amounts not reported as curricular and extra-curricular expenses, such as donations, surplus funds, and scholarships.

difference between the total estimated per student amount in the two studies did not appear meaningful at first. In analyzing the percentage breakdown however, insight was gained into the differences in funding practices. The figures showed that Alberta's schools drew 44.0% of their funds from fees; in contrast B.C.'s schools drew 41.7% of theirs from fund raising activities.

Comparison of the Allocation of Private Funds for B.C. and Alberta. In comparing the allocation of funds in the two studies, adjustments were made for differences in methodologies. In the Alberta study, not all respondents reported the allocation funds. Thus this study calculated the total amount of expenses as being $28.61 per student. In B.C., by eliminating the boards' contributions, the total amount of expenses at the school level was calculated as being $25.83 per student (amount reported in Table 19 on page 113, less amounts reported in Table 20 on page 114 and excluding the amount turned over to boards). Table 21 (page 115) compares the allocation of funds in both studies on an estimated per student amount and percentage basis of the estimated per student amount. The $2.78 difference in the total estimated per student amount between studies was more than the $1.75 reported in the sources of funds, yet this difference did not provide any meaningful information.

By analyzing the percentage breakdown insight was gained into the differences in funding practices between the two provinces. Alberta spent approximately 88% of its funds on curricular and extra-curricular programs, while in B.C. the figure was about 78%. The major difference between the provinces was in curricular programs where all students have a share in the funds. Alberta´s expenditures were 54.2% of the total amount of funds raised, while B.C.´s were 35.8%. In the other two categories of expenses, funds went to a minority of students who were involved in extra-curricular programs or who received scholarships. Alberta spent approximately 46% in these areas, whereas B.C. spent approximately 64%.

Discussion: Subproblem #1

Five findings regarding the sources and allocation of private funding at the school and district level were uncovered:

1) The predominant role that schools have in raising private funds.

2) The significant role that private funds play in public education.

3) In comparison to Alberta, B.C.´s private funding practices for public education is a charitable system

directed to a minority of students.

4) B.C. school districts are not drawing upon the sources of private funds as suggested by philanthropic statistics.

5) The provincial estimate for the source of foundation funds supports the use of this study as a general indicator to how funds were raised in the B.C. public school system.

School Level Role in Raising Private Funds.

The study suggests that raising private funds is more predominant at the school level than at the district level. The results showed that 93.33% of the private funds in the province were raised at the school level and 6.67% at the school district level. Schools raised 32.44% of the provincial funds from fees, 4.68% from gifts, 36.04% from fund raising activities, and 8.63% from school sales. The remaining 11.54% came from privately donated school level scholarships. It is apparent from these figures that private funding has a low profile at the school district level.

The Role That Private Funds Play in Public Education

The role that private funds play in public education is significant. This study revealed that an estimated $4.7 million of provincial private funds went to supplementing curricular programs, $5.5 million to extra-curricular programs, and $1.0 million was spent on consumable supplies during 1983/84. In total, $11.2 million was spent on supplementing curricular and extra-curricular program expenses. Nearly all this money went to the purchase of instructional supplies and the supply of transportation services (see Tables 39 and 40 on pages 154 and 156). The total amount of money spent by the Ministry of Education on instructional supplies and transportation services in B.C. schools in 1983/84 was approximately $160.3 million (B.C. Ministry of Education, 1984a) (Note 3), which suggests that the $11.2 million in private funds spent on curricular and extra-curricular programs was a 7% supplement.

Comparision of Private Funding Practices in B.C. and Alberta

When comparing the sources and allocation of private funds between B.C. and Alberta it became evident that Alberta´s funding practices are quite different. While both provinces depend upon private funds for supplementing educational programs and the per student amounts raised or spent are close, there are differences in their funding practices. Alberta schools collected the greatest portion of funds from fees that went to supplement curricular program expenses directed to the majority of students. B.C. schools received most of their funds from fund raising activities that were used to supplement extra-curricular program expenses directed to a minority of students. This difference in funding practices suggests that Alberta leans toward a user-fee system where funds are directed to a majority of students and B.C. leans toward a charitable system where funds are directed to a minority of students.

School District Private Funding Sources Versus Philanthropic Statistics

School districts in B.C. are not drawing upon the major sources of philanthropic funds. The results showed that they relied on foundations and trust funds to raise moneys. The school survey did not yield provincial estimates that could be compared with philanthropic statistics because some of the data is not philanthropic (for example, fees and cafeteria profits). The district survey results were more appropriate for comparing with philanthropic statistics. Using rank order for the categories of private citizens, foundations, and corporations, private citizens were found to be the leading contributors, followed by foundations and then corporations (see Table 18 on page 111) (Note 4). This rank order differs from that of Canadian philanthropic statistics (Arlett, 1982; see Chapter 2 page 9) which showed private citizens to be the leading contributors, followed by corporations and then foundations.

Support for use of This Study as a General Indicator to how Funds are Raised in the B.C. Public School System

The results of this study support its use as a general indicator to how funds were raised in the B.C. public school system. For example, foundations contributed an estimated $154,167 to the public school system in 33/84 (see Table 18 on page 111). The Vancouver Foundation, the major granting foundation for the B.C. public school system, reported giving out $125,000 in 1983/84 (B.C. School Trustees Association, 1984). Considering there were other foundations in the province making contributions to districts, these figures are complementary.

Subproblem #2

What are the components of school level and district level private funding practices?

To investigate this subproblem provincial estimates from school and district level surveys were examined by district types (based on enrolment size) and school types (based on grade level enrolment) to determine private funding practices. Charitable status and school board policies were also examined by district and school types(Note 5). Data on scholarships and school personnel involvement related to private funding activities were then examined by school type. The results used to investigate this subproblem will be analyzed first at the school district level, then at the school level.

School District Level Private Funding Practices

Sources of School District Private Funds

Districts reported raising an average of $1.99 per student in private funds. Table 22 illustrates the dollar range on a per student basis raised in each district according to district type and Table 23 illustrates the sources of each district´s funds on a percentage basis of the

Table 22

Dollar Range, on a per Student Basis, Collected by Each District Type According to Each District Type

Dollar Range			District Type			
	A	B	C	D	E	F
0.00		0.00 (B1)	0.00 (C1)			
0.01 - 1.00			0.20 (C2)		0.56 (E)	0.23 (F)
1.01 - 2.00				1.53 (D1)		
2.01 - 3.00	2.03 (A)					
3.01 - 4.00		3.83 (B2)	3.40 (C3)	3.25 (D2)		
⋮						
9.01 - 10.00		9.09 (B3)				
⋮						
14.01 - 15.00		14.94 (B4)				
⋮						
17.01 - 18.00			17.45 (C4)			

Table 23

Sources of Each District's Private Funds
on a Percentage Basis for 1983/84

District Sample	Private Funding Source (Percent of Dollar Amount Reported)					
Type-Dollar Amount	Foundations	Corporations	Private Citizens	Small Businesses	Trust Funds	Others[a]
A - 2.03						100.0
B1 - 0.00						
B2 - 3.83	33.0		50.0			17.0
B3 - 9.09		10.0	25.5	25.5		39.0
B4 - 14.94	5.0		20.0		50.0	25.0
C1 - 0.00						
C2 - 0.20			100.0			
C3 - 3.40	13.0			17.0	4.0	66.0
C4 - 17.45	5.0		75.0	20.0		
D1 - 1.53		12.0		59.0		29.0
D2 - 3.25	20.0	10.0	15.0	20.0	35.0	
E - 0.56	82.0		18.0			
F - 0.23	100.0					

[a] Includes service clubs, community groups, teachers' associations.

total dollar amount reported. Table 23 (page 124) illustrates that there was no relation between the per student amount raised in each district type and the sources or the number of sources from which funds were received. It should be noted that of those districts receiving zero amounts (B1 and C1, see Table 22 on page 123), one district in its response stated that raising private funds was a school level responsibility and not that of the district. Table 23 (page 124) further illustrates that the majority of districts receiving private funds had more than one funding source.

Table 23 (page 124) also illustrates that the majority of school districts having rural characteristics (district types A through E) raised more private funds from private citizens on a percentage basis than districts having urban characteristics (district type F).

Allocation of School District Private Funds

Table 24 illustrates the allocation of districts' private funds on a percentage basis of the dollar amount reported. There was no relation between the per student amount raised in each district type and the areas to which funds were allocated. However, Table 20 (page 114) shows that 72.86% of the funds were spent on scholarships and that the majority of districts allocated funds to scholarships,

Table 24

Allocation of Each District's Private Funds on a Percentage Basis for 1983/84

District Sample	Private Funding Allocation (Percent of Dollar Amount Reported)			
Type-Dollar Amount	Curricular Programs	Extra-curricular Programs	Scholarships	Others[a]
A - 2.03			100.0	
B1 - 0.00				
B2 - 3.83	50.0		50.0	
B3 - 9.09	40.0	60.0		
B4 - 14.94			90.0	10.0
C1 - 0.00				
C2 - 0.20		100.0		
C3 - 3.40	5.0	5.0	79.0	11.0
C4 - 17.45		10.0	90.0	
D1 - 1.53			100.0	
D2 - 3.25		10.0	90.0	
E - 0.56		82.0	18.0	
F - 0.23	80.0			20.0

[a] Includes donations, special projects, and multi-cultural programs.

followed next by extra-curricular programs. Table 24 (page 126) shows that seven of the 13 districts allocated 50% or more of their funds to scholarships and that six of the 13 allocated funds to extra-curricular programs.

School District Charitable Status

Five of the 13 school districts (B2, C2, D2, and F) reported having donation numbers, three (B2, B3, and D2) had charitable foundations, and a further three (B4, C4, and F) had plans to establish charitable foundations.

Districts with foundations performed slightly better than those districts without foundations, but not as significantly as suggested by the California research (Neill, 1983; Allen, & Hughes, 1982). When total dollar amounts are taken into consideration, the results showed that the three districts having foundations raised a total of $35,000 or $11,667 each. Those without foundations raised $115,875 or $11,588 each.

Districts with donation numbers reported raising a total of $39,100 or $7,820 each while those not having numbers reported raising $111,175 or $13,972 each. This result is interesting because donation numbers can be established as a tax incentive for donors. It would be expected that districts without donation numbers would not have performed as well as they did. Table 23 (page 124) shows that only one (B2) of the five districts possessing donation numbers received a dollar or more per student in private funds. This district enticed more than 50% of its donations from private citizens, a group that would benefit from the tax incentive.

The three districts planning to establish foundations out performed all others in raising funds. Of the $150,875 total amount reported by all districts, the three raised $81,750 or $27,250 each. On a per student basis one district raised $0.23 (F) while the other two raised $14.93 (B4) and $17.45 (C4). The latter two do not possess any type of tax incentive, yet one of them (C4) managed to draw 75% of its funding from private citizens and the other (B4) used trust funds as a means of raising 50% of its funding.

School Board Policies Regarding Private Funding

Two of the 13 districts enclosed copies of policies dealing with private funding that were in place in 1983/84 (Note 6). The policy of B4 dealt with a scholarship trust fund set up for a high school in the district and set out the procedure for receiving and allocating funds. In this case, 50% of the district´s private funds came from the scholarship trust fund.

The other district (C3) had a detailed policy for the distribution of funds in an equitable manner. However, Table 24 (page 126) shows that while its funds went to every category, the majority went to scholarships. It can not be assumed that the district is ignoring the policy. Rather it may be, as illustrated by Table 23 (page 124), that the major donors (community groups and service clubs) asked that their contributions be used for scholarships.

School Level Private Funding Practices: Sources

On a per student basis the amounts vary considerably among school types within each private funding source (see Table 25). The table also includes figures for district raised funds in order to better illustrate the total per student amount from which each school type draws its funds. The tables set out in the following pages provide details as to the sources of funding for the school types.

Fees

Students in the province paid an estimated $5.4 million in gross fees (see Table 26). Of this amount, $0.6 million was returned to students, $1.0 million was turned over to school boards for consumable supplies, and $3.8 million went into school programs and services. Tables 26 and 27 illustrate the fee situation in B.C. in 1983/84. Table 26

Table 25

Provincial Estimate of the Sources of Private Funds on per Student Basis by School Type in 1983/84

Sources of Private Funds	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Average per Student				
School Raised Funds					
-Fees (turned over to boards and allocated to school programs).	2.94	11.87	13.50	35.30	20.02
Gifts, Fund Raising and Other Sources (such as school sales and cafeteria profits).	11.75	26.35	9.93	13.55	21.67
School	14.69	38.22	23.43	48.85	41.69
School District Raised Funds	1.99	1.99	1.99	1.99	1.99
Scholarships Privately Donated (excluding university, government, school board scholarships reported by schools in "School Raised Funds"	0.01	14.93	0.00	6.72	10.20
Total	16.69	55.14	25.42	57.56	53.88

Table 26

Provincial Estimates of Student Fees by School Type in 1983/84

Fee Item	School Type					(Total)
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	
	Provincial Estimate (±1.00)					
Gross Fee	842,662	339,458	905,510	706,905	2,569,343	(5,363,878)
Amount Returned to Students	5,694	7,276	215,646	40,405	283,199	(552,220)
Amount Turned Over to Boards	321,692	90,112	68,986	108,755	422,514	(1,012,059)
Amount Allocated for School Programs and Services	515,276	242,070	620,877	557,745	1,863,630	(3,799,598)

Table 27

Student Fees by School Type in the Dollar Amount Reported and on a per Student Basis

Fee Item	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Gross Fee	38,949 (2.96)	9,423 (12.13)	44,500 (17.72)	105,513 (37.44)	114,065 (22.50)
Amount Returned to Students	250 (0.02)	200 (0.26)	10,600 (4.22)	6,036 (2.14)	12,603 (2.48)
Amount Turned Over to Boards	14,916 (1.13)	2,500 (3.22)	3,400 (1.35)	16,237 (5.76)	18,742 (3.70)
Amount Allocated for School Programs and Services	23,783 (1.81)	6,723 (8.65)	30,500 (12.15)	83,240 (29.54)	82,720 (16.32)

shows that school types containing elementary grades paid less in gross fees on a per student basis than those enrolling secondary grades. A factor contributing to this difference is the amount allocated to school programs. School types containing more specialized courses (such as those found in senior grades), optional courses, or courses requiring the use of consumable materials, had higher fees.

Table 27 contains two expenditures of funds which appear uncommon at first but can be explained by using inferences. One is that junior secondary schools have the highest per student fee amount returned to students; a fact which may be attributed to deposit fees. The other is that school types enrolling senior grades (grades 11 and 12) turned over the highest per student fee amounts to boards and to school programs. In the case of senior secondary and secondary types this may be attributed to expendable supplies and transportation costs in both curricular and extra-curricular programs (see expenditures in Tables 39 (page 154) and 40 (page 156)). In the case of elementary-secondary schools, this amount may be attributed to transportation costs in extra-curricular programs (see Tables 39 and 40). The reason why elementary-secondary schools allocated a great deal of their funds to transportion will be discussed under the section dealing with the allocation of funds.

The amount of fees on a per student basis varies considerably among school types. Table 28 sets out the highest and lowest gross fee amounts reported in the school survey as well as the highest and lowest net fee amounts (that is, the fee amounts after deducting the dollar amounts returned to students and turned over to the board). Although the study does not yield results that can be used to explain the differences in amounts, Table 28 demonstrates that fees varied considerably in each school type. In the case of senior secondary schools, gross fees varied by approximately $50.00 per student.

Table 29 illustrates the range of fees reported by each school in each school type. The fees are calculated on a per student basis of the dollar amounts turned over to the board and allocated to school programs. This study does not yield results that can explain the range of these fees. It is interesting to note that 50% of the elementary schools did not have fees of any sort (including deposits).

Gifts, Fund Raising, and Other Private Funds

An estimated $7.3 million (see Table 30) in private funds was brought in at the school level in addition to the $4.8 million in fees. The funding sources included monetary and non-monetary gifts, fund raising activities, and profits from school sales. These funds constituted approximately 49% of

Table 28

Highest and Lowest Reported Gross Fees and Net Fees on a per Student Basis by School Type

School Type	Gross Fee		Net Fee	
	High	Low	High	Low
Elem.	$18.12	$0.00	$14.18	$0.00
El./Sec.	$17.62	$3.96	$11.43	$3.96
Jr.Sec.	$22.89	$11.08	$16.69	$2.47
Sr.Sec.	$59.56	$9.21	$38.13	$8.29
Sec.	$41.28	$1.46	$23.99	$0.00

Table 29

Range of Fees[a] as Reported by Each School on a per Student Basis According to School Type

Fee Range	School Type				
	Elem.	El./Sec.	Jr.Sec. (per Student)	Sr.Sec.	Sec.
0.00	24				
0.01 - 2.00	6				1
2.01 - 4.00	6	1	1		
4.01 - 6.00	3				
6.01 - 8.00					
8.01 - 10.00	2			1	
10.01 - 12.00	2	1	1		1
12.01 - 14.00	1				
14.01 - 16.00	3				
16.01 - 18.00	1	1	1		1
18.01 - 20.00			1		1
20.01 - 22.00					
22.01 - 24.00					2
24.01 - 26.00					
26.01 - 28.00					
28.01 - 30.00					
30.01 - 32.00				1	1
32.01 - 34.00					
34.01 - 36.00					
36.01 - 38.00					
38.01 - 40.00					
40.01 - 42.00					1
42.01 - 44.00					
44.01 - 46.00					
46.01 - 48.00					
48.01 - 50.00					
50.01 - 52.00					
52.01 - 54.00				1	
54.01 - 56.00					
56.01 - 58.00					
Total	48	3	4	3	8

[a] Net fee plus amount turned over to the board.

Table 30

Provincial Estimates of Gifts and Other Private Funding Sources by School Type in 1983/84

	School Type					
Private Funding Source/Total	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	(Total)
	Provincial Estimate (±1.00)					
Gifts (monetary and non-monetary)	515,276	90,112	3,066	0	85,645	(694,099)
Fund Raising Activities	2,465,355	569,215	439,469	56,832	1,814,527	(5,345,397)
Other Sources (includes profits from school sales, cafeteria profits, etc.)	364,394	78,078	64,898	199,006	574,391	(1,280,766)
Total	3,345,025	737,405	507,433	255,838	2,474,562	(7,320,262)

the total provincial amount of private funds. Table 30 (page 137) shows the provincial estimates of these funding sources and Table 31 provides a breakdown of these funds by the dollar amount reported and on a per student basis for each school type. Details concerning the private funding practices of each school type is best left to a percentage analysis of the sources of funds (see next section).

Private Funds From Fees, Gifts, Fund Raising, and School Sales

Taking into consideration private funds raised only from fees, gifts, fund raising activities, and profits from school sales, the results showed that elementary schools raised 58.94% of their funds from fund raising activities (see Table 32). This percentage figure decreases with higher grade level school types; for example, 6.16% of the funds for senior secondary schools came from fund raising activities. Table 33 provides a provincial estimate for these sources and Table 32 shows the breakdown of sources on a per student and percentage basis for each school type. Table 34 provides the highest and lowest reported total amounts of private funds collected in a school type. Table 34 also demonstrates that the reported amount of funds raised on a per student basis varied considerably; for example in secondary schools there

Table 31

Gifts and Other Private Funding Sources by School Type in the Dollar Amount Reported and on a per Student Basis

Private Funding Source	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Gifts					
-monetary	14,635 (1.11)	0 (0.00)	0 (0.00)	0 (0.00)	700 (0.14)
-non-monetary	9,175 (0.70)	2,500 (3.22)	150 (0.06)	0 (0.00)	3,100 (0.61)
Gift Subtotal	23,810 (1.81)	2,500 (3.22)	150 (0.06)	0 (0.00)	3,800 (0.75)
-Fund Raising Activities	113,957 (8.66)	15,800 (20.34)	21,600 (8.60)	8,484 (3.01)	80,569 (15.89)
-Other sources (includes profits from school sales, cafeteria profits, etc.)	16,885 (1.28)	2,170 (2.79)	3,200 (1.27)	29,701 (10.54)	25,521 (5.03)
Total	154,652 (11.75)	20,470 (26.35)	24,950 (9.93)	38,185 (13.55)	109,890 (21.67)

Table 32

Sources of Private Funds[a] Based on a per Student and Percentage Basis by School Type

Private Funding Source	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	per Student (Percent±0.01)				
Fee Amount Turned Over to Boards	1.13 (7.71)	3.22 (8.42)	1.35 (5.78)	5.75 (11.79)	3.70 (8.87)
Fee Amount Allocated to School Programs and Services	1.81 (12.30)	8.65 (22.64)	12.15 (51.83)	29.54 (60.47)	16.32 (39.14)
Gifts	1.81 (12.31)	3.22 (8.42)	0.06 (0.25)	0 (0.00)	0.75 (1.80)
Fund Raising	8.66 (58.94)	20.34 (53.21)	8.60 (36.70)	3.01 (6.16)	15.89 (38.12)
Other Private Funding Sources (e.g. profits from school sales)	1.28 (8.73)	2.79 (7.31)	1.27 (5.44)	10.54 (21.58)	5.03 (12.08)
Private Funding Total	14.69 (99.99)	38.22 (100.00)	23.43 (100.00)	48.85 (100.00)	41.69 (100.01)

[a] Excludes privately donated school level scholarships.

Table 33

Provincial Estimates for Sources of Private Funds[a] by School Type in 1983/84

Private Funding Source	School Type					(Total)
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	
	Provincial Estimate (±1.00)					
Fee Amount Turned over to Boards	321,692	90,112	68,986	108,755	422,514	(1,012,059)
Fee Amount Allocated to School Programs and Services	515,276	242,070	620,877	557,745	1,863,630	(3,799,598)
Gifts, Fund Raising Activities and Other Sources (e.g. school sales, cafeteria profits).	3,345,025	737,405	507,433	255,838	2,474,562	(7,320,263)
Private Funding Total	4,181,993	1,069,587	1,197,296	922,337	4,760,706	(12,131,920)

[a] Excludes privately donated school level scholarships.

Table 34

The Highest and Lowest Reported School Raised Private Funds[a] (on a per Student Basis) by School Type

School Type	Private Funds[a] Raised on a per Student Basis	
	High	Low
Elem.	$53.63	$2.35
El./Sec.	$58.00	$16.06
Jr.Sec.	$24.42	$13.86
Sr.Sec.	$64.10	$11.60
Sec.	$85.22	$2.65

[a] Excludes privately donated school level scholarships. Includes funds from fee amounts turned over to boards and allocated to school programs, gifts, fund raising, profits from school sales, etcetera.

was a difference of approximately $83.00. No results were yielded that could explain the varying amounts.

Table 32 (page 140) provides substantial insight about various school type funding practices. Based on a percentage of the total school level raised funds (excluding privately donated scholarships), elementary and elementary-secondary types raised 50% or more of their funds from fund raising activities. For junior secondary, secondary, and senior secondary types the majority of funds came from fees which were either turned over to boards or allocated to school programs. This does not mean that fees were not important to elementary and elementary-secondary school funding. The results showed that elementary and elementary-secondary types raised approximately 20% and 30% respectively of their funds from fees which were turned over to boards and allocated to school programs. This is not to imply that junior secondary and secondary types did not rely on fund raising for funds. The results showed that junior secondary and secondary types raised approximately 37% and 38% respectively of their funds from fund raising activities. Senior secondary schools were an exception. For them, fees were the major funding source followed by profits from school sales, vending machines, and cafeteria sales. This school type raised approximately 22% of their funds from these profits.

As a percentage of the total amount of school level raised funds ($12.1 million; see Table 17 on page 109), schools collected little from gifts (monetary and non-monetary; excluding privately donated scholarships). It was only schools enrolling elementary grades (elementary and elementary-secondary) that received over a dollar per student. Elementary schools reported receiving $1.81 per student, with $1.11 coming from monetary gifts and $0.70 from non-monetary gifts (see Table 31 on page 139). Elementary-secondary schools reported receiving $3.22 per student, with all of this amount being "valued" from non-monetary gifts (see Table 31 on page 139). This is not to suggest that donors do not contribute funds to the other school types, rather they have goals in mind when it comes to donating gifts to higher levels of schooling: namely investing in students' futures with scholarships.

Scholarships: Privately Donated at the School Level

A considerable amount of the private funds raised in the public school system was allocated to scholarships (see section dealing with the expenditure of funds for details). As a provincial estimate, schools raised $75,492 for scholarships from funding sources already mentioned (such as student council, fund raising activities, school sales). In addition to this amount they reported that private citizens and community organizations donated an estimated $1.7 million for the sole purpose of scholarships. Table 35 shows the dollar amount and sources of privately donated scholarships each school type received. Table 36 provides a provincial estimate of these scholarships.

It can be seen from Table 36 that schools containing senior grades received the majority of scholarship funding and it appears that community organizations such as service clubs and associations were the major contributors. On a per student basis elementary-secondary schools received the highest amount in privately donated scholarships (see Table 35). It can be inferred that these school types, which are located in isolated or semi-isolated areas, received scholarships so that the financial burden for students attending post-secondary institutions would be lessened while they are away from the community.

Table 35

Privately Donated Scholarships by School Types in Dollar Amount Reported and on a per Student Basis

Scholarship Source/Total	School Type Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Community Organizations	100 (0.01)	11,300 (14.54)	0 (0.00)	14,050 (4.99)	41,800 (8.24)
Private Citizens	0 (0.00)	300 (0.39)	0 (0.00)	4,875 (1.73)	9,925 (1.96)
Total	100 (0.01)	11,600 (14.93)	0 (0.00)	18,925 (6.72)	51,725 (10.20)

Table 36

Provincial Estimates of Privately Donated Scholarships by School Type in 1983/84

	School Type					
Scholarship Source/Total	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	(Total)
		Provincial Estimate (±1.00)				
Community Organizations	2,847	406,902	0	94,216	940,951	(1,444,916)
Private Citizens	0	10,914	0	32,664	233,818	(267,396)
Total	2,847	417,816	0	126,880	1,164,769	(1,712,312)

School Level Private Funding Practices: Allocations

The allocation of private funds varied considerably among school types. Table 37 illustrates the per student amounts spent by each school type in the various categories. District expenditures are included in the table to illustrate the total expenditures of private funds by the public school system. The tables set out in the following pages provide details as to the allocations of funds for each school type.

School Level Expenditures of Private Funds

Schools spent an estimated $4.6 million on curricular programs and $5.3 million on extra-curricular programs (see Table 38). A further $1.0 million was turned over to school boards. As well an estimated $1.2 million went to donations or other expenses (not related to curricular and extra-curricular programs), including school raised scholarships and funds kept as surplus. Schools showing a surplus reported that the funds were held over for the following school year. As a provincial estimate, schools brought in and spent, excluding privately donated scholarships, $12.1 million. Table 38 provides a provincial estimate of the expenditures by school type.

Table 37

Expenditure of Private Funds at the School District and School Levels on a Percentage Basis of the Provincial Estimated Dollar Amount and on a Per Student Basis of the Dollar Amount Reported

Expenditure of Private Funds	Percent of Provincial Estimate (±0.01)	Per Student (Average per Student)
Curricular Programs		
District	0.60	0.18
Elem.	12.17	6.34
El./Sec.	1.78	9.46
Jr.Sec.	2.85	8.26
Sr.Sec.	1.83	14.34
Sec.	12.39	16.09
Curricular Subtotal	31.61	(9.44)
Extra-curricular Programs		
District	0.97	0.29
Elem.	10.69	5.57
El./Sec.	4.30	22.79
Jr.Sec.	2.99	8.67
Sr.Sec.	2.66	20.92
Sec.	15.35	19.94
Extra-curricular Subtotal	36.96	(11.03)
Scholarships (excluding government and university)		
District	4.86	1.45
Elem.	0.04	0.02
El./Sec.	2.87	15.19
Jr.Sec.	0.14	0.40
Sr.Sec.	1.00	7.89
Sec.	8.01	10.40
Scholarship Subtotal	16.91	(5.05)

Table 37 (Continued)

Expenditure of Private Funds	Percent of Provincial Estimate (±0.01)	Per Student (Average per Student)
Other Expenses		
District	0.23	0.07
Elem.	3.15	1.64
El./Sec.	0.47	2.49
Jr.Sec.	1.64	4.75
Sr.Sec.	0.85	6.66
Sec.	1.35	1.76
Other Expenses Subtotal	7.69	(2.30)
Amount Turned Over to Boards		
Elem.	2.17	1.13
El./Sec.	0.61	3.22
Jr.Sec.	0.47	1.35
Sr.Sec.	0.73	5.76
Sec.	2.85	3.70
Board Subtotal	6.82	(2.04)
Total	99.99	(29.86)

Table 38

Provincial Estimate[a] of the Expenditure of Private Funds by School Type in 1983/84

Fee Item	School Type					(Total)
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	
	Provincial Estimate (±1.00)					
Curricular						
-Capital	845,509	95,709	48,035	21,147	167,864	(1,178,264)
-Expendable	449,799	144,962	374,059	159,544	1,379,451	(2,507,815)
-Transportation	333,079	0	0	59,475	203,264	(595,818)
-Other Support	176,503	24,067	0	30,587	86,787	(317,944)
Curricular Subtotal	1,804,890	264,738	422,094	270,754	1,837,365	(4,599,841)
Extra-curricular						
-Capital	429,871	47,854	90,960	16,615	501,307	(1,086,607)
-Expendable	569,366	141,884	30,150	131,601	869,009	(1,742,010)
-Transportation	458,340	448,040	250,906	107,433	630,345	(1,895,064)
-Other Support	128,107	0	71,030	139,342	276,347	(614,826)
Extra-curricular Subtotal	1,585,684	637,778	443,046	394,991	2,277,008	(5,338,507)

Table 38 (Continued)

Fee Item	School Type					(Total)
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.	
	Provincial Estimate (±1.00)					
Other Expenditures						
-Donations and Other Expenses	136,648	69,683	233,021	125,747	28,548	(593,647)
-School Raised Scholarships	2,847	7,276	20,440	22,091	22,839	(75,493)
-Surplus	330,232	0	9,709	0	172,431	(512,372)
Other Expenditures Subtotal	469,727	76,959	263,170	147,838	223,818	(1,181,512)
Amount Turned over to Boards	321,692	90,112	68,986	108,755	422,514	(1,012,059)
Total	4,181,993	1,069,587	1,197,296	922,338	4,760,705	(12,131,919)

[a] Excludes privately donated school level scholarships

Table 39 shows how the dollar amount reported by each school type was spent and gives the expenditures on a per student basis.

The expenditure of funds on a per student basis, excluding privately donated school level scholarships, varies considerably among school types (see Table 39). Table 40 gives a breakdown of the expenditures on a percentage basis by school type. It is apparent that school types enrolling senior grades spent the largest percentage of their funds on extra-curricular programs.

Curricular and Extra-curricular Expenditures

Schools enrolling secondary grades spent $5.00 or more per student on expendable supplies in curricular programs according to the results shown on Table 39. As a percentage of the total amount allocated to curricular programs, this was 50% or more; in the case of junior secondary schools the figure was almost 90%. In the elementary type, the amount per student allocated to curricular programs was much lower than other school types, however the greatest amount of their funding was spent on capital equipment (approximately 47%) followed by expendable supplies (approximately 25%). Combining capital equipment and expendable supplies, each school type spent 65% or more of its curricular allocation on

Table 39

Reported Expenditures[a] of Private Funds by School Type

Expenditure of Private Funds	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Curricular					
-Capital	39,124	2,660	2,370	3,151	7,470
	(2.97)	(3.42)	(0.94)	(1.12)	(1.47)
-Expendable	20,826	4,026	18,390	23,803	61,256
	(1.58)	(5.18)	(7.32)	(8.45)	(12.08)
-Transportation	15,357	0	0	8,886	9,031
	(1.17)	(0.00)	(0.00)	(3.15)	(1.78)
-Other Support	8,160	665	0	4,559	3,841
	(0.62)	(0.86)	(0.00)	(1.62)	(0.76)
Curricular Subtotal	83,467	7,351	20,760	40,399	81,598
	(6.34)	(9.46)	(8.26)	(14.34)	(16.09)
Extra-curricular					
-Capital	19,826	1,330	4,474	2,500	22,275
	(1.51)	(1.71)	(1.78)	(0.88)	(4.39)
-Expendable	26,285	3,937	1,486	19,643	38,560
	(2.00)	(5.07)	(0.59)	(6.97)	(7.61)
-Transportation	21,230	12,441	12,322	16,029	27,997
	(1.61)	(16.01)	(4.91)	(5.69)	(5.52)
-Other Support	5,974	0	3,476	20,797	12,238
	(0.45)	(0.00)	(1.39)	(7.38)	(2.42)
Extra-curricular Subtotal	73,315	17,708	21,758	58,969	101,070
	(5.57)	(22.79)	(8.67)	(20.92)	(19.94)

Table 39 (Continued)

Expenditure of Private Funds	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Other Expenditures					
-Donations and Other Expenses	6,296 (0.48)	1,934 (2.49)	11,458 (4.56)	18,757 (6.66)	1,285 (0.25)
-School Raised Scholarships	100 (0.01)	200 (0.26)	1,000 (0.40)	3,300 (1.17)	985 (0.20)
-Surplus	15,257 (1.16)	0 (0.00)	474 (0.19)	0 (0.00)	7,672 (1.51)
Other Expenditures Subtotal	21,653 (1.65)	2,134 (2.75)	12,932 (5.15)	22,057 (7.83)	9,942 (1.96)
Amount Turned over to the Board	14,916 (1.13)	2,500 (3.22)	3,400 (1.35)	16,237 (5.76)	18,742 (3.70)
Total	193,351 (14.69)	29,693 (38.22)	58,850 (23.43)	137,662 (48.85)	211,352 (41.69)

[a] Excludes privately donated school level scholarships

Table 40

Reported Expenditures of Private Funds[a]
Based on a Percentage Basis by School Type

Expenditure of Private Funds	School Type Elem.	 El./Sec.	 Jr.Sec.	 Sr.Sec.	 Sec.
	Percent (±0.01)				
Curricular					
-Capital	20.23	8.96	4.03	2.29	3.53
-Expendable	10.77	13.56	31.25	17.29	28.98
-Transportation	7.94	0.00	0.00	6.45	4.27
-Other Support	4.22	2.24	0.00	3.31	1.82
Curricular Subtotal	43.17	24.76	35.28	29.35	38.61
Extra-curricular					
-Capital	10.25	4.48	7.60	1.82	10.54
-Expendable	13.59	13.26	2.53	14.27	18.24
-Transportation	10.98	41.90	20.94	11.64	13.25
-Other Support	3.09	0.00	5.91	15.11	5.79
Extra-curricular Subtotal	37.92	59.64	36.97	42.84	47.82
Other Expenditures					
-Donations and Other Expenses	3.26	6.51	19.47	13.63	0.61
-School Raised Scholarships	0.05	0.67	1.70	2.40	0.47
-Surplus	7.89	0.00	0.81	0.00	3.63
Other Expenditures Subtotal	11.20	7.19	21.97	16.02	4.70
Amount Turned over to Boards	7.71	8.42	5.78	11.79	8.87
Total	100.00	100.01	100.00	100.00	100.00

[a] Excludes privately donated school level scholarships

these expenses.

The expenditure on extra-curricular programs on a per student basis was higher than it was on curricular programs for all school types except elementary. Junior secondary schools spent 5% more on extra-curricular programs, secondary 24% more, and senior secondary 46% more. Elementary-secondary schools showed the most dramatic difference (141% more) owing to a $16.01 per student expenditure for transportation.

Transportation Expenditures

All school types enrolling secondary students (grades 8 to 12) spent $5.00 or more per student on transportation for extra-curricular programs (for elementary school the amount was $1.61). Elementary-secondary schools spent more than other schools enrolling secondary students, approximately three times more per student (see Table 39 on page 154). As a percentage of expenditures this means that elementary-secondary schools spent 41.90% of all the funds raised in their school type on extra-curricular transportation. Geographic location of this school type may be a contributing factor to higher transportation expenses for elementary-secondary schools since they are primarily located in isolated or semi-isolated areas.

Other Expenditures: School Raised Scholarships, Surplus, and Donations

In the category of other expenditures (see Table 39 on page 154), senior secondary schools on a per student basis allocated more than any other school type to school raised scholarships. This is understandable considering the number of grade 12 students that would be enrolled in this school type. Elementary and secondary types retained a $1.00 or more per student in surplus funds while the three other types retained zero or a negligible amount. Under the category "donations and other expenses", if it is assumed that donations make up an equal part of the amounts reported, the results suggest that junior secondary schools were the most generous with their funds, but senior secondary schools contributed the most on a per student basis to charity.

Scholarship Results: School and School District Level

Schools spent an estimated $75,492 of their school level raised funds on scholarships. In addition, an estimated $1.7 million was privately donated to schools for scholarships and $0.7 million was given out at the school district level for scholarships. This amounted to an estimated $2.5 million of private funds being allocated to scholarships in B.C. in 1983/84. Of the $2.5 million total an estimated $19,233 was held in surplus for the following school year. Table 41 provides a breakdown of private funds raised and collected for scholarships at the school and district levels.

Table 42 provides a breakdown on a per student basis of the private funding sources of scholarships, as reported by each school type.

University Scholarships

Table 43 shows the amount of university scholarships that schools reported receiving in 1983/84.

Privately Donated School Level Scholarships and Scholarships From Other Sources

At the time the school survey was completed, many schools had not received the precise dollar amounts coming in from B.C. government scholarships. Table 44 lists the sources of all scholarships for the public school system in 1983/84 as:

1. Government scholarships totalling approximately $1.1 million. The amount was calculated by taking 3% of the grade 12 enrolment in 1983/84 (35,632) (B.C. Ministry of

Table 41

Dollar Amount Reported and Provincial Estimate of Private Funds Allocated to Scholarships at the School and School District Levels in 1983/84

Scholarship Source	Dollar Amount Reported	Per Student	Provincial Estimate (±1.00)
School Level Scholarships			
Elem.	200	0.02	5,694
El./Sec.	11,800	15.19	425,092
Jr.Sec.	1,000	0.40	20,440
Sr.Sec.	22,225	7.89	148,971
Sec.	52,710	10.40	1,187,607
School Subtotal	87,935	3.60[a]	1,787,804
School District level Scholarships	110,358	1.45[a]	721,102
Total	198,293	5.05[a]	2,508,906

[a] Average per student (±0.01).

Table 42

Private Funding Sources of Scholarships as Reported by Schools on a per Student Basis

Private Funding Source	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
	Dollar Amount (per Student)				
Community Organizations	0.01	14.54		4.99	8.24
Student Council		0.26		1.17	0.08
School Raised Funds	0.01		0.40		0.12
Private Citizens		0.39		1.73	1.96
Total	0.02	15.19	0.40	7.89	10.40

Table 43

Dollar Amount Reported and Provincial Estimate of University Scholarships by School Types in 1983/84

School Type	Dollar Amount Reported	Per Student	Provincial Estimate (±1.00)
Elem.	N/A	N/A	N/A
El./Sec.	15,000	19.30	540,111
Jr.Sec.	N/A	N/A	N/A
Sr.Sec.	19,000	6.74	127,258
Sec.	3,935	0.77	87,929
Total	37,935	1.52[a]	755,298

[a] Average per student (±0.01).

Table 44

Government, University, and Privately Funded Scholarships for the B.C. Public School System in 1983/84

Scholarship Source	Percent of Estimated Dollar Amount (±0.01)	Average Per Student	Estimated Dollar Amount (±1.00)
Government	25.02	2.19	1,088,960
University	17.35	1.52	755,298
Privately Funded:			
Board Level	16.57	1.45	721,102
School Level	41.07	3.60	1,787,804
Privately Funded Subtotal	57.63	5.05	2,508,906
Total	100.00	8.76	4,353,164

Education, 1983b), multiplying this figure by the dollar amount per scholarship ($1,000), and adding ($20,000) in other government scholarships. ((0.03 x 35,632 x $1,000) + $20,000 = $1,088,960).

2. University scholarships totalling $755,298 (as calculated in this study).

3. Board scholarships totalling $721,102 (as calculated in this study).

4. School scholarships totalling $1,787,804 (as calculated in this study).

The results suggest that all school types had some form of scholarships given to their students. As a provincial estimate for privately donated scholarships (see Table 41 on page 160), secondary schools gave out the most, followed by school districts. Elementary-secondary schools gave out the greatest amount in scholarships on a per student basis, followed by secondary and then senior secondary schools.

As a provincial estimate of all scholarship funding for the public school system, private scholarships made up 57.63% of the scholarships given, government scholarships 25.02% and university scholarships 17.35% (see Table 44 on page 163). There is no evidence suggesting why private scholarships make up the greatest percentage of the scholarships given out in the province, yet the results of the study clearly show that contributors of private scholarships are the major source of scholarship funding.

School Personnel and Private Funding

The school survey asked schools to report on the number of hours per year of administrative, secretarial, and average teacher time put into funding activities (such as collecting fees, sponsoring activities, accounting tasks, and public relations). Table 45 shows the range of reported secretarial time spent in funding activities by school type. Table 46 shows the range of reported administrative time spent in private funding activities by school type. There is no apparent correlation between secretarial or administrative time and the funding practices by each school type or individual schools in either the collecting or allocating of funds. This suggests that the use of secretarial and administrative time in related private funding activities is a school decision.

Table 47 shows the range of reported average teacher time spent in private funding activities by school type. Table 48 gives a breakdown by school type of the number of hours spent per year by the average teacher in private funding activities in 1983/84.

It is apparent from the results that private funding at the school level is not cost-beneficial. The study showed

Table 45

Reported Secretarial Time (Range) Put into Private Funding Activities in Each School Type in 1983/84

Range (Hours per Year)	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
0					
(0 + - 25)	(27)				(2)
0 + - 50	36		1	1	3
(25 + - 50)	(9)		(1)	(1)	(1)
50 + - 100	6	1	1		3
100 + - 150	3			1	
150 + - 200	2	2			
200 + - 250					
250 + - 300			1		
300 + - 350					1
350 + - 400					
400 + - 450					
450 +					
Total (Responses)	47	3	3	2	7
Total Hours Reported	2,050	470	430	150	670

Table 46

Reported Administration Time (Range) Put into Private Funding Activities in Each School Type in 1983/84

Range (Hours per Year)	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
0	3				1
0 + - 5	1	1			
5 + - 10	7			1	2
10 + - 15	2				
15 + - 20	9				2
20 + - 25	2				
25 + - 30	5		1		
30 + - 35					
35 + - 40	5				1
40 + - 45					
45 + - 50	6				
50 + - 55			1		
55 + - 60	2	1			
60 + - 65					
65 + - 70			1		
70 + - 75	1			1	
75 + - 80	1				
80 + - 85					
85 + - 90					
90 + - 95					
95 + - 100	2			1	1
100 + - 105					
105 +		1			
Total (Responses)	46	3	3	3	7
Total Hours Reported	1,405	215	152	185	196

Table 47

Reported Average Teacher Time Put into Private Funding Activities in Each School Type in 1983/84

Range (Hours per Year)	School Type				
	Elem.	El./Sec.	Jr.Sec.	Sr.Sec.	Sec.
0	5				
0 + - 5	11	1	1		4
5 + - 10	15	1		2	1
10 + - 15	2				
15 + - 20	7			1	2
20 + - 25	2				
25 + - 30					
30 + - 35	2				
35 + - 40		1			
40 + - 45					
45 + - 50	2		1		
50 + - 55					
55 + - 60					
60 + - 65					
65 + - 70					
70 + - 75					
75 +	1				
Total (Responses)	47	3	2	3	7

Table 48

Time Spent in Private Funding Activities
by the Average Teacher in Each School Type in 1983/84

School Type	Total Hours Reported	Teaching Time Reported	Average Teacher Time in Hours/Year
Elem.	10,572.38	621.84	17.00
El./Sec.	804.50	49.20	16.35
Jr.Sec.	1,612.50	64.65	24.94
Sr.Sec.	1,660.00	128.00	12.97
Sec.	2,440.00	241.08	10.12
Total	17,089.38	1,104.77	15.47

that an estimated $12.1 million in funds was raised at the school level (see Table 17 on page 109). The results further showed that the average teacher put approximately 15.5 hours into private funding activities (see Table 48 on page 169). Based on a provincial figure (B.C. Ministry of Education, 1984a) of 28,000 full-time equivalent teachers, earning an average salary of $34,000 per year, the amount of time spent by teachers in private funding activities is equivalent to $14.8 million. This excludes the thousands of hours that administrators, secretaries, parents, and students put into private funding activities at the school level.

Table 47 (page 168) illustrates that the time put into private funding activities varies considerably among school types. On an individual school level there is no apparent relation between the funding practices of individual schools in each school type and the amount of time put into the funding activities by teachers. This suggests that the differences may be contributed to a number of different variables. Among these could be:

1) The amount of volunteer time and the number of activities carried on per year.

2) The amount of time teachers are "willing" to put into these activities as opposed to the amount of time "really needed".

3) The amount of responsibility delegated to students.

4) Individual school funding practices for collecting and allocating funds (for example, how much of the bookkeeping is done by teachers rather than secretaries or parents?)

Discussion: Subproblem #2

As mentioned in Chapter 3 in Data Analysis, the methodology used in this study does not allow for an analysis of school type performance in particular district types. Therefore, this discussion will focus separately on those findings associated with the components of private funding practices found at the school district level and those at the school level. The atypical sample will be used to assist in the investigation of this subproblem.

School District Level Discussion

Five findings associated with the components of school district level private funding practices were uncovered:

1) There is a relation between school district size (enrolment) and the percentage amount received from individual contributions (private citizens).

2) School districts are not effectively using tax incentives.

3) School districts are not distributing private funds in an equitable manner.

4) There is support for the proposition that policy and donors´ wishes can affect funding allocations.

5) The results of the atypical school district showed that novel approaches to raising private funds are effective for school districts having low economic or education status or high unemployment status.

Rural School Districts Versus Urban School Districts

This study lends support to the theory of Charles Benson (1982) that small districts (rural) have greater success than large districts (urban) in securing individual contributions. Table 23 (page 124) illustrates that seven of the 12 school districts with rural characteristics collected more contributions from private citizens than did the school district with urban characteristics.

Two Ineffective District Level Private Funding Practices

Ineffective use of Tax Incentives.

It has been shown that private funding has a low profile at the school district level (see page 118) and that districts are not targeting potential funding sources (see page 120). The results further show that tax incentives (donation number and charitable foundation status) are not being promoted or made available to potential donors of certain target groups. Table 23 (page 124) illustrated that the majority of school districts have diverse targets, and that only school districts B2, B3, and D2 are using their tax exemption status to raise a $1.00 or more per student from groups that benefit from the tax exemption (such as private citizens, small businesses, and corporations). One can not help but wonder if the per student amounts of districts B4 and C4, whose private funding performance stood out from the rest, would increase if there was some form of tax incentive for donors. The results also suggest that unlike California, (Neill, 1983; Allen, & Hughes, 1982) the foundation approach is not effectively working for B.C. school districts. This may be attributed to private funding having a low profile at the school district level.

Inequitable Distribution of Private Funds. In investigating the private funding practices of school districts as they relate to the allocation of funds, the results suggested that funds are not distributed in an equitable manner to students. The majority of district funding went to a minority of students for scholarships and most districts allocated the majority of their funds to this category.

The Effects of District Policy and Donors´ Wishes on Private Funding Practices

It was illustrated with school district C3 that policy can affect the distribution of private funds and that donors may have the final say on how their contributions are to be used (see pages 128 and 129). As George Neill (1983) suggests with the foundation approach, which this study showed is equally applicable to privately donated scholarships, a certain degree of control by school districts over the allocation of funds is lost and districts may be more accountable to donors than they are to schools, parents, school trustees, or teachers.

Novel Funding Practices can be Effective

In analyzing the atypical school district´s results, the importance of target groups in raising private funds became clear. This district was able to raise $14.51 per student, an amount well above most districts in the actual sample. This amount does not support philanthropic literature which suggested that philanthropy is made possible through wealth and earnings and is dependent upon them. If the literature was correct the district´s per student amount should have been considerably lower because of its low economic and education status and high unemployment status. However, as far as sources and allocation of funds are concerned, the results do support fund raising literature and illustrate that disadvantaged school districts do not need to depend upon support of individual donors. The atypical district did not receive its funds from private citizens, rather it used another target group, small business, for eliciting.

This district demonstrated that disadvantaged districts are able to draw support through targeting the appropriate group. The district also does not have any form of charitable status and is in the process of establishing a novel purpose for a foundation. The plan is to create a foundation that will provide interest free loans to graduates who are attending post-secondary institutions. By following effective foundation practices there is a good chance that their innovation will succeed.

School Level Discussion

Thirteen findings associated with the components of school level private funding practices were uncovered:

1) School types have different private funding practices.

2) There is no consistent application of user-fees or service charges in the B.C. public school system.

3) Donations to schools mainly take the form of scholarships. School district donation numbers, if they exist, do not attract donations for other uses.

4) Elementary-secondary schools are heavily supplementing extra-curricular transportation expenses.

5) There may be allocation practices unique to each school type beyond that of supplementing curricular and extra-curricular program expenses.

6) Private scholarships (including district level private scholarships) are the major source of scholarship funding for students.

7) Elementary-secondary students received more on a per student basis from privately donated scholarships than any other students from other school types.

8) On a per student basis, schools in the province raised more privately donated scholarships than did school districts.

9) Decisions regarding private funding practices are made at the school level.

10) Private funding at the school level is not cost-beneficial.

11) Private funding practices may not only be affected by school type, but also by other dimensions such as geographic location.

12) There are common funding practices between the

atypical elementary school and the atypical elementary-secondary school (independent schools) which are not found to the same degree in public schools.

13) From interviews with the head masters there may be reason to suspect that private funds in independent schools are equally distributed among students.

School Level Private Funding Practices

Private Funding Practices Regarding School Sources. The results suggest that elementary and elementary-secondary schools lean toward fund raising activities, followed by fees, to supplement school program expenses; junior secondary and secondary schools lean toward fees, followed by fund raising activities; and senior secondary schools lean toward fees, followed by profits from school sales. The results further suggest that higher grade level school types raise more funds (excluding privately donated scholarships) on a per student basis. Elementary schools raised $14.69 per student, while junior secondary raised $23.43, elementary-secondary $38.22, secondary $41.69, and senior secondary $48.85 (see Table 32 on page 140).

Private Funding Practices Regarding School Allocations. The results suggest that a large percentage of the funds in each school type is spent on a minority of students who participate in extra-curricular programs. The exception is with elementary schools who lean toward private funds for supplementing curricular program expenses directed to a majority of students. Other school types lean toward private funds to supplement programs directed to a minority of students through extra-curricular expenses and other expenses not related to curricular programs. In junior secondary schools there is an equitable distribution of funds between curricular (35.28%) and extra-curricular (36.97%) programs.

Using only school level raised funds and the allocation percentages of these funds in various school types, the results suggest that elementary schools are heavily supplementing curricular program expenses, especially capital equipment expenses. In other school types the percentage spent on curricular programs is less than elementary schools, however the results still showed that 65% or more of the money spent on curricular programs was used for capital equipment and expendable supplies. In extra-curricular programs the major expense for school types enrolling secondary grades was transportation followed by expendable supplies.

User-fee or Service Charge Practices at the School Level

The fee amount paid by students in each school type varied and some elementary schools had no fees whatsoever. This suggests that there is no consistent application of user-fees or service charges in school types throughout the province. It also suggests that the application of fees or charges may be controlled by factors such as school and/or district policy. Elementary schools paid the least amount on a per student basis, with the amounts increasing with each higher grade level school type. The increase in fees can be attributed to higher costs in specialized courses and optional courses. In junior secondary schools, deposit fees may be a contributing factor to the high amount of gross fees.

Donations to Schools: Scholarships and Gifts

District donation numbers, or school donation numbers if they exist, are mainly used for scholarship purposes and do not attract donations for other uses. Excluding privately donated scholarships, only elementary and elementary-secondary schools received on a per student basis substantial amounts in the way of gifts. When privately donated scholarships are taken into consideration, then secondary and senior secondary schools also received substantial amounts; and junior secondary schools received the least amounts from gifts.

Elementary-secondary School Expenses for Transportation

School types enrolling secondary grades are heavily supplementing extra-curricular transportation expenses . Elementary-secondary schools spent $16.01 per student on transportation expenses-- two to nine times higher than any other school type. An inference may be made that this expense is because of their geographic location which requires higher transportation expenses.

Allocating Practices Beyond That of Supplementing Curricular and Extra-curricular Programs

Although there is no substantial supporting evidence, the results indicate that there may be allocation practices that are unique to each school type beyond that of supplementing curricular and extra-curricular program expenses. The study showed that junior secondary schools may be the most generous in donating the funds they raised. On the other hand, senior secondary schools may have contributed the highest amount on a per student basis. Senior secondary schools spent more of their funds on school raised scholarships than any other school types. Secondary and elementary schools retained the highest percentage of their funds as surplus(a $1.00 or more per student).

Private Scholarships Versus Provincial and University Scholarships

School and school district level private scholarships are the major source of funding for students pursuing a post-secondary education. According to the results private scholarships from all sources made up 57.63% of all scholarships given in the province, while government scholarships accounted for 25.02% and university scholarships 17.35%.

Private Scholarships: School Level Versus District Level

Based on all private funding allocations in the public school system each school type allocated more money per student to any one category of expenses than did school districts, except with scholarships. School districts on a per student basis contributed more to scholarships than did elementary and junior secondary school types. This finding is understandable considering these two school types have limited need for scholarships.

Scholarship funding is a major district funding practice, yet the results indicated that the amount allocated to scholarships at the district level was five to 10 times less per student than in those school types enrolling senior secondary grades.

Decisions Regarding Private Funding Practices

The actual sample suggests that decisions regarding private funding practices are made at the school level. The results showed that there is a considerable difference in the amount of private funds raised on a per student basis among schools in each school type. Due to the methodology adopted it is difficult to assess if the differences are caused from a school's geographic location, economic-social status, funding practices, or any combination of the three.

The results further suggest that the use of personnel in private funding activities is a school level decision. Amount of time put in by school personnel in private funding activities varied considerably among the schools in each school type. Results from the atypical secondary school's use of personnel time lends further support to this suggestion. The amount of time reported by the atypical secondary school was low. Five hours per year was the average teacher time reported, five hours per year of administrative time, and one hour per year of secretarial time. Although the times are low, they are in line with the range variations found in the actual sample.

Cost-benefit of School Level Private Funding

Private funding at the school level is not cost-beneficial. The provincial results of this study showed that the average teacher in 1983/84 put approximately 15.5 hours into private funding activities to raise an estimated $12.1 million. Based on 28,000 teachers earning an average salary of $34,000, the amount of time teachers spent in private funding can be estimated to be $14.8 million. It should be noted that this finding excludes the time put in by other school personnel, parents, and students.

Atypical Secondary School Results and The Effects of Geographic Location on Private Funding Practices

Atypical Secondary School Results. In regard to funding sources, the practices of the atypical secondary school are worth noting. On a percentage basis for the total amount of funds raised ($66.78 per student) the school's funding practices were more like that of elementary or elementary-secondary school types. Fees accounted for approximately 20% of the funds raised, fund raising 79%, and other sources 1%. On a percentage basis for the allocation of funds, the school's funding practices were more like that of an elementary-secondary school type. The secondary school spent approximately 25% on expendable supplies for curricular programs, 10% on expendable supplies for extra-curricular programs, and 65% on transportation expenses for extra-curricular programs. There is no apparent evidence why the atypical secondary school's practices are more like that of an elementary or elementary-secondary school type. Evidence that can be reported on with confidence can only come through further research on how specific economic and geographic location factors affect private funding practices.

Effects of Geographic Location on Private Funding. The atypical secondary school raised all of its privately donated scholarships ($28.29 per student) from community organizations. This amount is considerably higher than the secondary school norm. Thus, its scholarship practices appear more akin to those of elementary-secondary schools. This may be due to the semi-isolated location of the atypical school, which is supported by the suggestion that geographic location is a contributing factor in regard to the scholarship amount a school receives.

Private Funding Practices Found in the Atypical Elementary and Elementary-Secondary Schools (Independent) That are not Found in the Public Schools

In analyzing the independent schools it was found that the elementary-secondary school raised $3,437.82 per student. Fees accounted for $3,368.54, gifts $49.27, and fund raising activities $20.01. The elementary school raised $781.05 per student. Fees accounted for $323.67, gifts $430.33, fund raising activities $12.08, and school sales $14.97. The discrepancy in fees is related to the accounting systems utilized. The elementary-secondary school's tuition fees are paid directly to the school while the elementary school fees are paid to the school's educational board as well as the school. Excluding fees, the elementary-secondary school raised $69.28 per student and the elementary school $457.38. In terms of the amount of teacher time put into private funding, the elementary-secondary school reported 40 teachers put in an average of two hours per year each and the elementary school reported 20 teachers put in an average of 20 hours per year each. There is no doubt, based on public school teachers' wages, that private funding in these schools is cost-effective. The question then arises, what makes their private funding practices effective? In interviews with the head masters, three practices common to both schools stand out from those of public schools:

1) Raising private funds is the responsibility of the educational committee. (Moneys from fund raising activities are the least amount collected in comparison to other sources.)

2) Teacher involvement in private funding activities is usually limited to fund raising activities related to classroom instruction.

3) Parent volunteers lessen the work loads of teachers in fund raising activities and if teachers are involved they do it as part of their classroom instruction or for public relations.

There may also be reason to suspect that funds are more equally distributed among students.

Equitable Distribution of Private Funds in the Atypical Elementary School

With only the elementary school reporting the allocation of funds it was found that extra-curricular programs were the most heavily funded (54%), followed by curricular programs (44%). The 10% difference was attributed to transportation costs in extra-curricular programs. These results were in keeping with elementary public schools.

The independent school reported 30% of its funds going to capital equipment expenses in curricular programs and 30% to capital equipment expenses in extra-curricular programs. These expenses are understandable considering that independent schools rely more on private funds for financing educational programs than public schools.

It is difficult to assess, without further investigation, if the distribution of funds among students is equitable. From interviews with the head master of the elementary school one suspects that a higher percentage of students participate in extra-curricular programs because more of the programs are established for participation of the whole student body than would be the case in public schools.

Subproblems #3 and #4

What are the major issues in private funding for public education?

and

What are effective practices for private funding for public education?

These two subproblems were combined in one section because generalizations formulated from the questionnaire responses could be used to investigate both subproblems simultaneously. Responses of superintendents and principals are set out, followed by the generalizations. From the generalizations, other generalizations are formulated regarding major issues in private funding for public education and effective private funding practices.

Questionnaire Responses of Superintendents and Principals of the Actual Sample

Set out in the following pages are two lists. List 1 gives the superintendents´ responses and List 2 gives the principals´ responses.

List 1-- Superintendents´ Responses

Set out below are the responses of superintendents regarding the benefits and disadvantages of school district and school involvement in private funding. On the right side of each page is the number of times each issue or concern was raised on the questionnaire. Also included are superintendents´ opinions on user-fees or service charges.

District Level Benefits	Response
1. Helps to supplement, fund, or enhance educational programs not covered by the operating budget (for example, cultural events, fine arts, athletics and scholarships).	(8)
2. Increases autonomy, in that private funds are able to be spent at one´s own discretion.	(2)
3. General approval.	(1)

District Level Disadvantages	
1. Privatizaton phenomenon (Note 7): (a) poor districts at a disadvantage; (b) inequitable distribution of wealth among districts; (c) district competition; (d) donor may misunderstand use; (e) obligation to donor; (f) increases administrative overhead.	(7)
2. Funds are directed toward a minority of students.	(2)
3. Districts can not function on variable financing.	(2)
4. Equipment donated must be maintained.	(2)
5. General disapproval: education is the taxpayers´, general publics´, government´s responsibility.	(3)

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School Level Benfits

1. Helps to supplement, fund, or enhance educational programs not covered by the operating budget. For example, cultural events, fine arts, athletics and scholarships. (8)

2. Closer community and school relations (parent involvement). (3)

3. Increases autonomy, in that private funds are able to be spent at one´s own discretion. (2)

4. General approval. (2)

School Level Disadvantages

1. Privatization phenomenon: (a) obligation to donor; (b) inequitable distribution of funds among schools; (c) school competition; (d) schools risk a negative attitude from parents/community; (e) parents may be upset at the burden placed upon them; (f) accountability problems; (g) increases administrative overhead. (7)

2. Takes away from instructional time. (3)

3. Schools can not function on variable financing. (2)

4. Students should not be placed in a situation that requires door-to-door knocking. (2)

5. Government and taxpayers will lose their sense of responsibility. (2)

User-fees or Service Charges

Five of the 13 superintendents were opposed to user-fees or service charges in public education. The balance only favoured them for extra-curricular programs if the fees or charges were at a reasonable level, closely monitored, and/or for consumable supplies.

List 2-- Principals´ Responses

Set out below are the responses of principals regarding the benefits and disadvantages of school district and school involvement in private funding. On the right side of each page is the number of times each issue or concern was raised on the questionnaire. Also included are principals´ opinions on user-fees or service charges.

District Level Benefits	Response
1. Helps to supplement, fund, or enhance locally needed educational programs and scholarships.	(19)
2. Closer community and district relations.	(11)
3. One person can solicit at the district office, rather than a number of people at the school level.	(2)
4. Private enterprise can get involved in education such as in adopt-a-school programs.	(1)
5. Increases autonomy.	(1)
6. General approval.	(3)

District Level Disadvantages	
1. Privatization phenomenon: (a) obligation to donor; (b) inequitable distribution of wealth among districts; (c) accountability problems; (d) increases bureaucracy; (e) increases competition for private funds among districts.	(20)
2. Reduces government´s responsibility.	(15)
3. Time consuming.	(8)

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4. Unreliable source of financing.	(4)
5. Can be used as a measurement as to the success of a district.	(2)
6. Shifts the role of administrators.	(2)
7. General disapproval.	(5)

School Level Benefits

1. Helps to supplement, fund, or enhance locally needed educational programs and scholarships.	(23)
2. Closer community and school relations (parent involvement).	(16)
3. Educational value for students.	(7)
4. Closer student and teacher relations that are not found in a regular classroom setting.	(3)
5. Needed in times of restraint.	(3)
6. General approval.	(2)

School Level Disadvantages

1. Privatization phenomenon: (a) fund raising can be overdone; (b) inequitable distribution of wealth among schools; (c) obligation to donors; (d) increases competition for private funds among schools; (e) hides real costs of education; (f) accountability problems; (g) competes with other fund raising organizations; (h) denies some students or schools programs or services; (i) places a financial burden on families.	(29)
2. Time consuming for teachers and administrators.	(22)
3. Unrealiable source of financing.	(6)
4. Fund raising can be used as a measurement to the success of a principal or school.	(5)
5. Government may begin to ignore their responsibility.	(5)
6. Taxpayers are paying twice.	(3)

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7. Shifts the role of the administrator. (2)

8. Directed to a minority of students. (2)

9. Commitment to maintaining donated equipment. (2)

10. General disapproval. (3)

User-fees or Service Charges

Principals did not respond in the majority of cases by either directly approving or disapproving user-fees or service charges. The following list illustrates the various responses with the number of times the response appeared on the questionnaire. The total number of responses is greater than the number of respondents because some principals raised more than one issue or concern relating to fees or charges.

1. Public education should be provided. (17)

2. Needed for extended field trips, consumable supplies, and special projects. (11)

3. Students who are unable to pay can not use; denies some students access to programs. (9)

4. Disagree, but do not want services cut. (6)

5. General disapproval. (6)

6. Just another tax. (4)

7. Necessary for students to learn that nothing is free and to respect the services being provided. (3)

8. No opinion. (3)

Generalizations From Superintendents' and Principals' Responses

Generalizations were formulated based on the most frequently raised concerns by superintendents in each category and the two most frequently raised concerns by principals in each category. The exception was with a generalization which was formulated concerning the educational value and the unique teacher-student relationship found in private funding activities. This is not to imply that responses not discussed are not important, rather an attempt was made to reflect the salient concerns raised by superintendents and principals. Set out below are the generalizations regarding superintendents' and principals' responses:

1. Both groups felt that private funding helped to financially supplement educational programs, including scholarships, at both the district and school levels.
2. Only principals viewed private funding as a benefit for closer school or district and community relations. Those superintendents mentioning closer community relations viewed them as existing only at the school level.
3. Only principals viewed private funding as having educational value for students, in addition to providing

a unique student and teacher relationship that is not found in a regular classroom setting.

4. Both groups felt that private funding at both the school district and school levels had to deal with the privatization phenomenon.

5. Principals were concerned that the private funding done at the district level could reduce the government's responsibility toward education. (Three of the 13 superintendents had similar views.)

6. Principals thought that private funding at the school level was time consuming for school personnel. (Three of the 13 superintendents had similar views, but phrased it as taking away from instructional time.)

7. On the issue of user-fees or service charges, a majority in each group disapproved of these systems. The minority saw nothing wrong with fees and charges if the costs were incurred directly by the students.

Generalizations Regarding Major Issues and Effective Practices

From the above, the following generalizations can be formulated regarding major issues in, and effective practices for, private funding for public education.

Major Issues in Private Funding

1. Private funding helps to supplement educational program expenses at both the district and school level.
2. Private funding helps bring about closer school/district-community relationships.
3. Private funding has educational value for students in addition to providing opportunities for unique teacher and student interaction not found in the classroom.
4. Privatization phenomena are encountered by being involved with private funding.
5. Private funding reduces government responsibility.
6. Private funding is time consuming and takes away from instructional time.
7. User-fee or service charge systems ought not to exist, unless they are for costs directly incurred by students.

Effective Practices for Private Funding

1. Private funding ought to help to supplement educational programs and services.
2. Private funding ought to be carried on so as to enhance school/district-community relationships.
3. Private funding ought to provide learning

opportunities for students and opportunities for teacher and student interaction.

4. Private funding ought to minimize privatization phenomena.

5. Private funding ought not to reduce government's responsiblity.

6. Private funding ought not to be time consuming for school personnel or take away from instructional time.

7. User-fee or service charge systems, if they exist, ought to only be for costs directly incurred by students (for example, consumable supplies and materials).

Discussion: Subproblems #3 and #4

Seven major issues of private funding for public education were uncovered (see pages 195 and 196). To discuss these issues, an assessment of the superintendents' and principals' responses was made by comparing them with the atypical sample responses on the questionnaire. Further assessment was made by comparing the responses with each other and with the findings from the actual and atypical samples. Other comparisons were made with the literature. Through this assessment, the seven generalizations regarding effective private funding practices for the B.C. public school system were reduced to three major generalizations.

Questionnaire Responses of the Atypical Sample

Outlined below are the questionnaire responses of the atypical sample. As a reminder, the elementary-secondary head master did not respond to the questionnaire.

Atypical District Superintendent

The superintendent in the atypical district felt that private funding for educational programs should not be carried on at the school level and private funding at the district level should be oriented to scholarships. On the issue of user-fees, he/she disapproved of such systems because they deny some students access to programs and undermine the tenet of public education being equal for all students. His/her responses were in keeping with those expressed by other superintendents.

Atpical Secondary School Principal

The principal of the secondary school viewed private funding as a necessity for programs because the moneys are not available otherwise. On user-fees or service charges, he/she felt they should only exist for optional materials in projects that students will keep. His/her responses were in keeping with those expressed by other principals.

Atypical Elementary School Head Master

The head master of the elementary school viewed private funding in "private" education as the educational committee's responsibility, as a way to purchase equipment, and a way of involving parents at both the school and committee level. At the school level he/she viewed fund raising activities as a way for schools to draw parents, teachers and students together. On the issue of user-fees or service charges, he/she thought it would be difficult for "public" schools to institute, whereas in independent schools they have "...knowledge and control over persons not able to pay" (Note 8). His/her responses were different from those expressed in the actual principal sample. He/she saw private funding as the "board's" responsibility and thought school involvement in fund raising activities should be minimal and for public relations purposes.

Major Issues in Private Funding for Public Education and Effective Private Funding Practices

Supplementing of Program Expenses

The survey findings support the responses by superintendents and principals that private funding helps to supplement educational programs at the school and district level. There was a slight difference between superintendents and principals about what was meant by educational programs. Superintendents saw private funding as providing "extras" that are not covered by the operating budget, whereas principals saw private funding as supplementing expenses that are necessary to serving the school's and district's clients.

Public Relations and Private Funding

A major difference between the responses of superintendents and principals was concerned with public relations. Principals viewed private funding activities as bringing about closer school/district-community relations, while superintendents viewed closer community relations as existing only at the school level. This may have been an oversight by superintendents or, more likely, they did not see the benefits at the district level. This can be inferred because the study's results suggest that private funding at the school district level has a low profile. Obviously not all funding activities will lead to closer community relationships, for example collecting fees and charges. Carnivals (where the community is brought into the school building) or the donating of scholarships and equipment (where the donor senses the worth of his/her contribution) are activities that foster closer relations and if properly conducted can be considered effective public relations. If private funding was more a district's responsibility, perhaps more superintendents would have seen the public relations benefit.

Educational Value of Private Funding

Only principals saw the educational value of private funding for students, as well as the unique student and teacher relationship which would be provided by private funding activities. It is understandable why these would be viewed only by principals. Principals would need to rationalize many of the funding activities carried on in the school in terms of educational benefits. As for the unique teacher and student relationship, this can be seen as one of the intrinsic rewards that principals, teachers, and students receive from private funding activities. Certain funding activities allow the client and professional to work together by exchanging ideas to achieve the same goals and objectives.

Privatization Phenomena of Private Funding

Both superintendents and principals appear to be aware of the many privatization phenomena that can be encountered. The respondents showed that the phenomena are diverse at the school and district level. The literature suggests that many of the phenomena can be minimized through effective public relations and effective fund raising practices. The results of the actual and atypical sample suggest that the phenomena can be centralized and successfully handled if the current private funding practices of the public school system are reformed. This means that if school level private funding was kept to carnivals and the like, and if school districts and their boards had a higher profile and responsibility in raising funds, then the school level benefits of closer community relations and the educational value for students could continue to exist.

Districts using the foundation approach would also centralize many of the privatization phenomena (for example, equitable distribution of private funds and less competition at the school level for philanthropic funds). Those phenomena that the foundation staff can not minimize can then be handled by district staff (for example, the number of fund raising activities carried out by a school may be controlled by policy and promoting the real cost of operation can be handled through public relations).

Governmental Responsibility in Private Funding

The concern over reduction of government's responsibility for financing public education can be minimized through reforms to present provincial educational financing. There is no doubt that private funds are needed in public education in order to preserve the benefits of private funding. This study shows the significant role private funding has in supplementing educational programs. School and district administrators felt that private funds could help to foster closer community relationships. The literature suggests that public institutions require private support for public relations purposes. This being the case, provincial financing formulas ought to exist to ensure an equitable distribution among school districts of private and public funds.

A matching system negotiated by all sectors of the public school system could be instituted whereby school districts capable of generating great sums of money could be given a dollar by the provincial government for every dollar raised. Those school districts, which are not as capable, due to constraints beyond their control, can be given larger matching amounts (for example, $10 for every dollar raised).

School district autonomy could be extended to allow school boards to raise more funds through investing private funds and developing existing property holdings. As an example the Vancouver School Board, assisted by a provincial development grant/loan, could construct a multistory building on one of the properties which it owns. One floor could be used by the board for its own purpose, another for municipal and provincial agencies related to education (the rental could be minimal), and the remaining floors could be leased or rented for office and retail use at the fair market value.

Such a reform to educational financing could prevent the reduction of the government's responsibility and bring educational financing in keeping with each school district's needs and their capability to raise both tax dollars and private dollars. The reform would also be an asset to minimizing and controlling privatization phenomena. To institute such reforms would require financing formulas that would be equitable for all school districts and at the same reduce the competition among school districts. The reforms could allow districts to effectively serve their clients in a fiscal crisis climate.

Cost-benefit of Private Funding

The issue raised by principals that private funding is time consuming for school personnel is supported by the results of this study. Individual teachers devote on the average approximately 15.5 hours per year to related private funding activities; this excludes the tens of thousands of hours put in by other school personnel. These figures support the opinion that private funding is time consuming and (as discussed earlier) is not cost-beneficial at the school level. The practices of the independent school system suggest that private funding done at the board level is cost-beneficial. By having school districts take the major role in raising private funds, schools and teachers can be left to attend to instructional tasks. At the school level fund raising activities can be coordinated and carried out by parent volunteers. Any involvement by teachers and students would only be an extension of the classroom or for public relations.

User-fee or Service Charge Systems

On the issue of user-fees or service charges, this study showed that fees or charges accounted for approximately 32% of the private funds raised. With such a sum being raised, coupled with the varying range found in each school type and the disapproval indicated by superintendents and principals, there is reason to suspect that the issue must be reviewed throughout the province and within each district. At the present time, fees or charges appear to be an extra tax charged to clients to use services or consume products that they are able to afford.

Effective Practices for Private Funding for Public Education

In comparing the responses by superintendents and principals, many similarities and dissimilarities were found between the two groups. The survey data supports some of the responses by both groups. The literature on fund raising illustrates that many of the disadvantages indicated by the two groups can be minimized through effective fund raising activities and the benefits maximized; the atypical sample exemplifies this. The preceding discussion suggested that the major issues can be dealt with through effective practices. Highlighted from the discussion on the major issues in private funding are the following suggestions for effective private funding practices for the B.C. public school system:

1. Private funding should have a high profile at the school district level. School level private funding should only exist for public relations and educational purposes. School district level practices should exist to centralize the privatization phenomena and make private funding cost-beneficial. Also school district policy should be established regarding private funding practices for the school district and its schools.
2. There should be a matching system instituted at the provincial level to ensure that private funding and the ability to raise funds is equally distributed among school districts.
3. Incentives should be given to school districts to extend private funding into the investment arena. This will allow boards to profit from the potential market value of their property holdings and to invest surplus private funds. Such investments could assist in bringing educational financing in line with each district's capability to raise local funds that can be used in the long-term to offset government spending.

Notes for Chapter 4

1. In calculating the allocation of private funds in a dollar amount from SECTION C of the school survey (computing dollars from percentage figures reported), the percentage figures reported in each item were multiplied by the dollar amount reported in SECTION B - LINE 10 and rounded off to the nearest dollar. When the calculated dollar amount in SECTION C did not equal that of LINE 10, the difference was added or deducted from the highest allocated item.

2. As a provincial estimate, schools reported raising $75,492 for scholarships from student council and various fund raising activities. In addition, they reported receiving an estimated $1,712,312 for the sole purpose of scholarships from private citizens and community organizations. Including school board privately donated scholarships in the amount estimated at $721,102, the total provincial estimate for private scholarships was $2,508,906 (see Table 19 on page 113).

3. Since the 1983/84 figures were unavailable at the time of writing, 1982/83 figures were used on the assumption that government spending in these two areas would not dramatically change over a one year period.

4. No attempt was made to combine categories because it was impossible to determine if a small business (for example,

corner stores) would be considered private citizens or corporations (for example, regional store chains). At the same time some private agencies or associations may have had their own trust funds for donating and therefore would be considered foundations, whereas those associations without charitable status would have to be considered groups of private citizens.

5. No schools enclosed school level policies, and only one senior secondary school reported a donation number. Therefore, no examination was made between the amount of funds collected by school types and their charitable status.

6. Two other school districts sent polices regarding private funding, but one district policy was not instituted in the 1983/84 school year and the other sent a draft document of a policy.

7. The term "privatization phenomenon" are those factors (phenomena) that go hand-in-hand with the concept of privatization as they relate to private funding. The term "privatization" is not meant to give a negative connotation for the reader as may be the case with other literature. This study found that there was concern that private funding could, for example, increase administrative overhead, cause an inequitable distribution of funds among schools and districts, increase competition for philanthropic funds, make the donee accountable to the donor, have donors misunderstand

their contributions uses, and deny some students access to programs. The phenomena are real, some are problems that can be overcome through reform to current private funding practices and others are inherent. This study does not distinguish between the phenomena, instead it recognizes the phenomena as a privatization phenomenon that exists and which can be broken down and minimized, depending upon school and district private funding circumstances.

In reporting on the responses to the privatization phenomenon, the number appearing to the right of the page indicates the number of superintendents or principals that raised one or more of these concerns. As an example, seven respondents could have raised six concerns (meaning two respondents each raised the same concern).

8. Quoted from questionnaire.

CHAPTER 5

SUMMARY, CONCLUSION, IMPLICATIONS, AND FURTHER RESEARCH

Summary

The Problem

This study examined the question of private funding for elementary and secondary public education in the province of B.C. in the 1983/84 school year. The sources and allocation of school and school district private funds were investigated as well as their private funding practices. In addition, major issues in private funding in public education and effective private funding practices were considered. The benefits and dysbenefits of private funding were identified so the educational community could institute private funding practices that would maximize the benefits and minimize the dysbenefits.

Analysis of the Problem

To analyze the problem it was necessary to use the literature on private support for public education and expand into the fields of philanthropy and public relations.

The philanthropic literature suggests that there may be external conditions, such as tax laws, and internal conditions, such as public relations, that affect contributions. In a fiscal crisis environment the dollar amount does not drastically decrease, at worst it plateaus, and the competition for philanthropic funds increases. To gain philanthropic support, innovative and effective fund raising practices are instituted and aimed at the appropriate target groups.

Public education in B.C. has had a tradition of relying upon private support to carry on programs that effectively serve their clients. This support takes various forms including monetary support through fund raising, trust funds, and charitable foundations. Voluntary support, user-fees or service charges, privately donated scholarships, gift donations, and business and corporate support are other forms. In the past, the infusion of private funds provided the "little extras". Today, they are needed to supplement educational program expenses or to initiate programs and services that have traditionally relied upon public funds.

The benefits of private support extend beyond supplementing programs. Fund raising activities carried on at the school level provide learning opportunities for students but some, such as soliciting door-to-door, can place students at risk. An effective school fund raising program adds favourably to school-community and school-home relations, with the student as the beneficiary.

The use of the foundation approach in securing ample funds has proven successful in jurisdictions in the U.S. that have had their taxes limited through legislation. This approach however, may cause school boards to sense a loss of control over the distribution of funds and the school district may find that the foundation board is more accountable to donors than it is to the school district and its members.

Other support is obtained from the community and its members. Volunteers donate their resources, knowledge, and time. Their support is essential to raising philanthropic funds and is an important element in assessing the cost-benefit of fund raising practices. Volunteers also reduce teacher work loads either through assisting in the preparation of classroom materials or by supervising children on the playground. Work loads are further reduced by adopt-a-school programs and volunteer tutors. These volunteer services keep down the costs of financing programs, but there are concerns integrated with voluntary support. With adopt-a-school programs, adoptees may be exposed to unintentional business or corporate propaganda. With volunteer tutors, schools serving working class communities may find less voluntary support than schools serving middle class communities.

In jurisdictions where user-fees or service charges exist, an assortment of problems related to the equality of education may be encountered. For example, poor and disadvantaged clients have an extra financial burden in attaining access to quality programs (in terms of optional materials and programs). The tenet that public education is for all stratas of society is undermined. And costs incurred in the form of fees or charges may be viewed by parents or guardians as an extra tax.

Scholarship support from a variety of private sources supplements university and government scholarships and can be described as an investment into those students pursuing a post-secondary education.

Private support in the form of money contributions is affected by district size. Small districts (rural) are more successful in attaining contributions than large districts (urban). Private support may also be affected by policy. At the provincial level no incentives are given to school districts or schools to raise funds. In fact, provincial restrictions are placed on costs incurred by students, and boards must approve fees or charges for optional courses and materials. Guidelines are laid out in the Administrative Handbook (B.C. Ministry of Education, 1982a) on how schools are to collect and allocate funds. For the most part private funds can be collected and spent as schools see fit and are only constrained by the School Act (B.C. Ministry of Education, 1983c), Regulations (B.C. Ministry of Education, 1982b), and board policy.

Administrative leadership ought to exist to delegate responsibilities that control the objectives of private support programs. These tasks are viewed on a par with any other educational administrative tasks. There is no doubt that public education, or any public institution for that matter, can not effectively operate without the private support of its constituents. Establishment of effective private funding practices, carried out by the administrative team and other members of the organization, can maximize the benefits of private support and minimize its dysbenefits. Through effective practices, schools and school districts can continue to service their clients efficiently in a fiscal crisis environment.

Methodology and Instrumentation

The actual sample in the study consisted of 13 school districts and 66 schools (48 elementary, three elementary-secondary, four junior secondary, three senior secondary, and eight secondary). Schools and districts were representative of their total population in the province of B.C. in 1983/84. School districts were chosen on the basis of geographic location, enrolment size, and economic, education, and unemployment status. Schools came from the sampled school districts and were chosen on the basis of their enrolment size and grade levels. The 13 superintendents and 64 principals used in the study came from the sampled schools and school districts. Districts in the sample constituted 17.33% of the provincial districts and had an enrolment of 76,000 students or 15.28% of the provincial enrolment. Schools in the sample constituted 4.17% of the provincial schools and had an enrolment of 24,300 students or 4.90% of the provincial enrolment.

Data for the study was gathered in three ways. A school survey and a school district survey were used to probe the sources and allocation of private funds, the amount of time school personnel put into private funding activities, and school district charitable status. A questionnaire was used to elicit opinions from superintendents and principals regarding private funding for public education.

Results for this study were from the purposive sample of 13 school districts and 66 schools and were extrapolated to the total population of B.C. school districts and schools.

An atypical sample was used to assist in the investigation of the study. A school district and a public secondary school were part of this sample and were accidently sent surveys. The school district had rural characteristics and low economic and education status and high unemployment status. The secondary school came from this district and had an enrolment under 400. Two independent schools from the Greater Vancouver Region were purposively sampled. One was an elementary school with an enrolment between 201 and 300 and the other was an elementary-secondary school with an enrolment over 301.

The study was not designed to provide statistically valid information regarding the amounts of private funds brought into the B.C. school system in 1983/84 and the results are not exact figures of how private funds were allocated. Instead the study was designed to provide general indicators as to where private funds originated and how they were spent. In addition, opinions were elicited from superintendents and principals in order to formulate generalizations regarding major issues in private funding for public education and effective private funding practices.

Findings

The study showed the significant role that private funding has in supplementing educational programs in the B.C. public school system. In comparison to Alberta, the B.C. public school system leans toward a charitable system to fund programs which are directed to a minority of students.

The extrapolation of results revealed that the B.C. public school system received an estimated $14.8 million in private funds. Schools raised $12.1 million of this amount. An estimated $4.8 million came from student fees and $5.3 million from fund raising activities. A further $0.7 million came from monetary and non-monetary gifts and $1.3 million came from other sources such as profits from vending machines and school sales. School districts raised an estimated $1.0 million from trust funds, foundations, private citizens, and businesses. The remaining $1.7 million came from privately donated school level scholarships.

The results indicated that $4.7 million of the $14.8 million was spent on curricular programs and $5.5 million on extra-curricular programs. A further $1.0 million was turned over to school boards for consumable supplies. An estimated $2.5 million was given out in private scholarships (donated and school raised scholarships) and $1.1 million went to other expenses, donations, or was retained as surplus.

Through the opinions of superintendents and principals a number of major issues in private funding for public education and effective private funding practices were identified.

School District Level Findings. The study illustrated a number of components associated with school district level private funding practices. School district level private funding has a low profile and during 1983/84 accounted for approximately 7% of the private funds raised in the public school system. Districts relied upon foundations and trust funds to raise the majority of funds that were allocated to a minority of students in the form of scholarships.

There was ample evidence suggesting that district level private funding practices are not as successful as they could be. School districts are not drawing upon corporations and individuals for support to the extent that philanthropic statistics suggest and the foundation approach is not working as successfully as U.S. studies suggest it could. School district tax exemption numbers appear to be used mainly for scholarships and not other gifts (monetary or non-monetary); this finding supports the proposition that contributors may have the final say on how their contributions are to be used.

The proposition that small districts (rural) have greater success in securing individuals' contributions than large districts (urban) is supported by this study. Also supported is the proposition that effective public relations networks aimed at the appropriate target groups are necessary for securing funds.

School Level Findings. The study showed a number of components associated with school level private funding practices. Excluding privately donated scholarships, the funding practices among school types varied in the following ways:

1. Elementary schools raise the majority of their funds from fund raising, followed by fees. The largest percentage of funds are allocated to curricular programs.
2. Elementary-secondary schools raise the majority of their funds from fund raising, followed by fees. The largest percentage of funds are allocated to extra-curricular programs, especially transportation expenses.
3. Junior secondary schools raise the majority of their funds from fees, followed by fund raising. The funds are equally allocated to curricular and extra-curricular programs.
4. Senior secondary schools raise the majority of their funds from fees, followed by profits from school sales. The largest percentage of funds are allocated to extra-curricular programs.
5. Secondary schools raise the majority of their funds from fees, followed by fund raising. The largest percentage of funds are allocated to extra-curricular programs.

At the school level there was ample evidence suggesting that there is an inconsistent application of fees. Range of fees varied among school types; for example, junior secondary schools had what appeared to be an abnormally high deposit fee on a per student basis. Fees also varied among schools within each school type; for example, some elementary schools did not have any sort of fees.

There was also evidence suggesting that private funding practices may be affected by geographic location. Elementary-secondary schools allocated a large percentage of their funds to supplementing transportation costs. Their scholarship funds per student were extremely high and may be attributed to scholarships(in the form of bursaries) that assist students while they are away from the community. The atypical secondary school which was located in a semi-isolated area and had funding practices more akin to an elementary—secondary school added support to the proposition that private funding practices may be affected by geographic location.

The findings also showed that each school type may have unique allocating practices beyond those dealing with curricular and extra-curricular programs.

Scholarship Findings. Even though school districts are heavily involved in scholarship funding, it was found that school types enrolling senior grades raised and collected more on a per student basis for scholarships than the average per student amount at the school district level. Privately donated scholarships at both the school and district levels constituted the majority of scholarship funding for the province and surpassed that provided by either universities or the provincial government. The majority of such funding came from community organizations, such as service clubs, followed by private citizens. These findings further suggested that the major source of scholarship funding for students pursuing post-secondary education came from privately donated scholarships.

Cost-benefit of Private Funding. Using only the amount of time that teachers put into related private funding activities, the study showed that private funding at the school level is not cost-beneficial. Notwithstanding this finding, there were thousands of hours per year put in by administrators, secretaries, students, and parents.

School Personnel Involvement in Private Funding. This study found that the average teacher puts approximately 15.5 hours per year into related private funding activities. The study further showed that the range of time put in by school personnel in each school type varied considerably. This suggests that the use of personnel in private funding is a school level decision.

Major issues in Private Funding for Public Education. This study supported two of the generalizations formulated from superintendents' and principals' responses regarding private funding for public education. One, private funding supplements educational program expenses. Two, private funding in terms of its cost-benefit is time consuming for school personnel.

Two other generalizations formulated from principals' and superintendents' responses paralleled the literature. One, private funding can bring about closer school-community relations. Two, fund raising activities can provide students with learning opportunities.

The privatization phenomena expressed by superintendents and principals and their concern that government's responsibility to public education may be reduced, are supported by the literature and can be minimized through effective private funding practices and reform to current educational financing formulas.

Except for those costs incurred directly by students, the use of user-fees or service charges in public education met with disapproval from superintendents and principals. They viewed such fees or charges as an extra tax. They also expressed the view that only those students who can afford to pay for services and programs can use them. According to the literature, such concerns can not be ignored if the tenet that public education is for all stratas of society is to be preserved.

Effective Private Funding Practices for Public Education. Using the literature, the responses from superintendents and principals, and the findings from the atypical and actual samples, effective practices for private funding in the B.C. public school system should:

1. Have a high profile at the school district level.
2. Supplement programs and services directed to a majority of students.
3. Incorporate effective public relations networks so that home and community relations are enhanced at both the school and school district levels.
4. Incorporate effective fund raising programs that provide learning opportunities for students and allow for student and teacher interaction not found in the regular classroom.
5. Minimize and centralize the effects of privatization phenomena.
6. Be cost-beneficial and have limited teacher involvement.
7. Not reduce government's responsibility to public education.
8. Have a consistent application for user-fees or service charges that do not undermine the tenets of public education.
9. Have the elements of effective public relations

networks, fund raising programs, and foundation (and/or tax exemption status or incentives) practices.

Conclusion

In examining the question of private funding for public education, the findings showed the significant role it can have for education. Private funding, however, has its problems.

Using the findings and the educational literature, a number of benefits and dysbenefits can be identified. The benefits and dysbenefits must not be assessed as either good or bad, negative or positve; rather, they must be acknowledged as existing and viewed in terms of maximizing the benefits and minimizing the dysbenefits.

Set out below are the benefits and dysbenefits identified through an examination of the question of private funding for public education.

Benefits

1. Private funding helps to supplement educational programs; for example, transportation costs and scholarships.
2. Some private funding activities can enhance home and

community relationships.

3. Some fund raising activities provide opportunities for student learning and unique student and teacher interaction not found in the classroom.

4. Volunteers reduce teachers' work loads and the costs of programs and services that would only otherwise be possible with paid personnel.

5. Though it is not clear from the literature or the results of this study, there appears to be a perception that schools and school districts have a sense of increased autonomy.

Dysbenefits

1. Private funding is time consuming for people involved in raising funds and is not cost-beneficial at the school level.

2. Some private funding activities take away from classroom instruction.

3. The constraints of private funding or support (see pages 44 to 46).

4. Private funds go to a minority of students.

5. Contributors of private funds may limit the use of their donations (particularly to scholarships).

6. There are an assortment of privatization phenomena

encountered by being involved in private funding.

7. Government may lose its sense of responsibility.

8. The inconsistent application and use of user-fees or service charges.

Implications

To maximize the benefits and minimize the dysbenefits of private funding for B.C., public education requires the establishment of effective funding practices and reform to current practices at the provincial, school district, and school levels.

The following recommendations are suggested:

Provincial Level

1. Establishment of school district incentives to raise and invest private funds.
2. Establishment of a matching system for the raising of local private funds.
3. Review of user-fee or service charge systems.

School District Level

1. Establishment of effective private funding practices;

especially foundation (or other tax exemption status) practices.

2. Establishment of a higher private funding profile.
3. Review of user-fee or service charge systems.
4. Establishment of policies regarding door-to-door soliciting by students, adopt-a-school programs, allocation of funds, and the donation of monetary and non-monetary gifts.

School Level

1. Establishment of effective school fund raising programs.
2. Review of user-fee or service charge systems.
3. Establishment of policies and practices on the collecting and allocating of private funds.

Further Research

Given the relatively small amount of knowledge that exists regarding private funding for public education, this study has been of an exploratory nature. In order to effectively preserve the benefits of private support and minimize its dysbenefits, the following are areas for further research on the subject:

1. Research into school and school district administration of private support and vehicles available for raising private funds.
2. Comparative research into the private funding practices of independent and public schools.
3. Examination of how the social-economic status of schools and school districts affect their private funding practices.
4. Investigation of the relationships between private support and school climate and/or student achievement.
5. Examination into how various groups of people (for example, administrators, teachers, parents, and non-parents) perceive private funding for public education.

APPENDIX A

B.C. FOUNDATIONS FOR B.C. PUBLIC SCHOOLS

APPENDIX A

B.C. Foundations for B.C. Public Schools[a]

NAME	GRANTING INFORMATION
The Vancouver Foundation	Provides grants for a number of different educational concerns.
Central Okanagan Foundation	Granting boundary is the Central Okanagan Region as defined by the boundaries of School District #23. Encourages advancements in education and funds scholarships.
The George N. Morgan Foundation	Interests are in agricultural education.
W.A. McLennan Scholarship Fund-Trust	Has five scholarships for students of the Langley School District.
The Law Foundation of B.C.	Encourages innovative law programs.
August Martin Piltz Foundation	Provides grants to needy and worthy students of the Cariboo-Chilcotin geographic region who are pursuing their education.
The Leon & Thea Koerner Foundation	Provides grants for a number of different educational programs and concerns.

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[a] From the Canadian Directory to Foundations and Granting Agencies (Arlett, 1982). This list shows the foundations in 1982 that would accept grant applications from B.C. school districts or students; includes the foundations that were established for school districts. The list is by no means complete. It is difficult to assess a foundation's granting policies and guidelines without going beyond the directory's data. Those foundations that were established for districts are difficult to pin point because the foundation's name does not indicate its purpose. For the most part, these foundations are concerned with funding scholarships or innovative programs.

APPENDIX B

THE SCHOOL LEVEL SURVEY

SURVEY ON PRIVATE FUNDING FOR PUBLIC EDUCATION AT THE SCHOOL LEVEL

NOTE: School identity is not required.
CODE: ______________________________ (for research purposes).

INSTRUCTIONS

1. Please complete all six sections and the questionnaire and return by 1984 10 31.
2. Use "best-estimate" where precise information is not available.
3. Information requested is for the 1983-1984 school year.
4. Return survey and questionnaire in enclosed addressed and postage-paid envelope to:

Kirk Salloum
c/o Graduate Programs
Faculty of Education
Simon Fraser University
Burnaby, B. C.
V5A 1S6

SECTION A - DEMOGRAPHIC DATA FOR 1983/84.

1. What was your school's enrolment at each of the following levels as of June 28, 1984? (Full-time equivalent)

Elementary (K-3) ____________________
Elementary (4-7) ____________________
Junior High (8-10) ____________________
Senior High (11-12) ____________________
Special Education ____________________
Total ____________________

2. How much administrative time was allocated to your school? (Full-time equivalent, exclude Department Heads.)

Total ____________________

3. How much teaching time was allocated to your school? (Full-time teacher equivalent, exclude administrative time)

Total ______________

4. What was the total population of your "catchment" area? (i.e. What was the population (include all people) of the area from which you drew the majority of your students? Provide a "ball park" figure to the nearest hundred.)

Total ______________

SECTION B - PRIVATE FUNDING FOR 1983/84 IN DOLLARS

1. FEES (all types)

LINE 1 - State the total (gross) dollar amount collected from students. (This includes all funds whether or not they were retained by the school. Include, for example, fees such as student union, annuals, locker, club, sports, instrument, IE projects, transportation, other "user" fees, et cetera.)

LINE 1 $ __________

LINE 2 - State the dollar amount (if any) in LINE 1 which was returned to students during or at the end of the school year. (Include only that amount which was received by students in the form of "cash".)

LINE 2 $ __________

LINE 3 - State the dollar amount (if any) included in LINE 1 which was turned over to the School Board.

LINE 3 $ __________

LINE 4 - Net dollar amount of private funding [LINE 1 - (LINE 2 + LINE 3)].

LINE 4 $ __________

2. GIFTS AND DONATIONS

LINE 5 - State the dollar amount (if any) your school received in cash. (Do not include money collected at fund raising events. Include, for example, money donated for equipment, for special playground projects, for school programs, et cetera.)

LINE 5 $ ______

LINE 6 - State the cash value (if any) of non-monetary items your school received. (Include, for example, library books, trophies, equipment, et cetera.)

LINE 6 $ ______

LINE 7 - Total cash and cash value (LINE 5 + LINE 6). LINE 7 $ ______

3. FUND-RAISING

LINE 8 - State the net dollar amount raised (after expenses) through "special events" to raise funds. (Include, for example, carnivals, raffles, movies, concerts, "drives", "thons", et cetera.)

LINE 8 $ ______

4. OTHER FUNDING

LINE 9 - State the net profit (after expenses) from all other school level operations not already reported above. (Include, for example, vending machine and cafeteria operations, sale of school supplies and materials, school pictures, shop services, student council operations, et cetera.)

LINE 9 $ ______

5. TOTAL NET DOLLAR AMOUNT OF PRIVATE FUNDING

LINE 10 - Total of LINES 4 + 7 + 8 + 9. LINE 10 $ ______

SECTION C - ALLOCATION OF PRIVATE FUNDS FOR 1983/84 IN PERCENT

1. Based upon the total dollar amount in SECTION B, LINE 10, provide a percentage breakdown of expenditures in each of the following categories:

CURRICULAR

A. Capital Equipment for curricular programs A. ______%

B. Expendable Supplies for curricular programs B. ______%

C. Transportation for curricular programs C. ______%

D. Other Support for curricular programs D. ______%

EXTRA-CURRICULAR

E. Capital Equipment for extra-curricular programs E. ______%

F. Expendable Supplies for extra-curricular programs F. ______%

G. Transportation for extra-curricular programs G. ______%

H. Other Support for extra-curricular programs H. ______%

OTHER

I. Charitable Donations and Other Expenditures not classified above. I. ______%

J. Surplus, if any. (Please comment on what is done with the surplus.) J. ______%

Total 100 %

Comment: ______________________________

____

____

2. Does your school have, independent of the school board, its own Charitable Donation number? (That is to say, is your school registered as a Charity Association and/or Canadian Athletic Association?)

YES ___ NO ___

3. If "YES", to #2, what amount in dollars from LINE 10 was not reported to the school board? $ ______________

4. If "YES", to #2, comment as to why your school has its own Charitable Donation number. (What are the benefits and disadvantages to a school having its own Charitable Donation number?)

Comment: ____

____

____

SECTION D - SCHOLARSHIPS

1. List the dollar amount (if any) received and/or collected for scholarship purposes for the 1983/84 school year from each of the following sources:

A. Community Organizations $ __________
B. Student Council $ __________
C. School raised funds (exclude student council) $ __________
D. Private Citizen scholarships $ __________
E. Universities $ __________
F. Ministry of Education and/or School Board $ __________
G. OTHERS:
______________________________ $ __________
H. ______________________________ $ __________
I. ______________________________ $ __________

LINE 11 - Total $ __________

2. List the dollar amount (if any) given out in scholarships in your school in the 1983/84 school year.

LINE 12 $ __________

3. Surplus (LINE 11 - LINE 12)
(If there is a surplus, please comment on what is done with the extra monies.)

(SURPLUS) LINE 13 - Total $ __________

Comment: ____

____

____

____

SECTION E - PERSONNEL

1. Estimate the number of hours spent in 1983/84 by all administrators in your school (exclude Department Heads) in regard to private funding in your school. (Include, for example, allocating funds and public relations (PR) activities.)

______ hours/year

2. Estimate the number of hours spent in 1983/84 by the average teacher in your school in regard to private funding. (Include, for example, collecting student fees, sponsoring fund raising activities, allocating funds, public relations (PR) activities, et cetera.)

______ hours/year

3. Estimate the number of hours of secretarial time (all secretaries) spent in 1983/84 in regard to private funding in your school. (Include, for example, accounting and bookkeeping tasks.)

______ hours/year

SECTION F - COMMENTS

Please make any comments regarding this survey and give any further information which may aid in this study. (For example, enclose school policies regarding scholarships and student fees.)

END OF SURVEY. PLEASE DO QUESTIONNAIRE.
THANK YOU FOR YOUR ASSISTANCE.

APPENDIX C

ALBERTA TEACHERS' ASSOCIATION SURVEY

SCHOOL-LEVEL FINANCE SURVEY
THE ALBERTA TEACHERS' ASSOCIATION

NOTE: SCHOOL IDENTITY IS NOT REQUIRED

Instructions

1- Please complete all three sections and return by 1983 11 25.

2- Use "best-estimate" where precise information is not available.

3- Information requested is for the 1982-83 school year.

4- Return survey in enclosed addressed and postage-paid envelope. If mislaid, return to -

ATA SCHOOL-LEVEL FINANCE SURVEY
11010 - 142 Street
EDMONTON, Alberta
T5N 2R1

5- Questions about the survey should be directed to Ms Brighid McGarry, Phone 453-2411 (from Edmonton) or 1-800-232-7208 (from elsewhere - toll free).

SECTION A - Demographic Data

1- What was your school enrolment at each of the following levels as of September 30, 1982? (Exclude ECS)

Elementary (1 - 6) ______________
Jr High (7 - 9) ______________
Sr High (10 - 12) ______________
Total (1 - 12) ______________

2- In which community is your school located? (Check one)

Edmonton or Calgary ______________
Other City ______________
Other ______________

3- Under what type of jurisdiction does your school operate? (check one)

Public District ______________
Separate District ______________
Division ______________
County ______________
Other ______________

SECTION B - School Level Revenue for 1982/83 in dollars

1- FEES (all types)

LINE 1 State the total (gross) dollar amount collected from students. This includes all revenue whether or not retained by the school. Only bus pass sales are to be excluded. Include, for example, fees such as student union, locker, textbook or rental, club, sports, instrument, course, transportation (if not a bus pass sale), other "user" fees, etc. LINE 1 $____________

LINE 2 - State the dollar amount (if any) of fees included in LINE 1 which were remitted to students. LINE 2 $____________

LINE 3 - State the dollar amount (if any) of fees included in LINE 1 which were remitted to the School Board. LINE 3 $____________

LINE 4 - Net fee revenue (Line 1 -(Line 2+Line 3)) LINE 4 $____________

2- GIFTS AND DONATIONS

LINE 5 - State the total dollar amount of cash and cash value of equipment. LINE 5 $____________

3- FUND-RAISING

LINE 6 - State the net dollar amount raised (after expenses) through carnivals, raffles, movies, concerts, "drives", "thons" or any other activities classified as "special events" to raise funds. LINE 6 $____________

4- OTHER REVENUES

LINE 7 - State the net profit (after expenses) from all other school level operations not already reported above. Include, for example vending machine and cafeteria operations, sale of school supplies and materials, school picture charges, shop services, student council operations, etc. LINE 7 $____________

5- TOTAL NET REVENUE

LINE 8 Total of Lines 4 + 5 + 6 + 7 LINE 8 $____________

SECTION C - Allocation of Revenue for 1982-83 in Percent.

1- Based upon total net revenue reported in Section B, Line 8, provide a percentage breakdown of expenditures in each of the following categories:

CURRICULAR

A. Capital Equipment for curricular programs ____________%
B. Expendable Supplies for curricular programs ____________%
C. Transportation for curricular programs ____________%
D. Other Support for curricular programs ____________%

EXTRA-CURRICULAR

E. Capital Equipment for extra-curricular programs ____________%
F. Expendable Supplies for extra-curricular programs ____________%
G. Transportation for extra-curricular programs ____________%
H. Other support for extra-curricular programs ____________%

OTHER

I. Charitable Donations and Other Expenditures not classified above ____________%
J. Surplus, if any ____________%

TOTAL 100%

END OF SURVEY

APPENDIX D

THE SCHOOL DISTRICT LEVEL SURVEY

SURVEY ON PRIVATE FUNDING FOR PUBLIC EDUCATION AT THE DISTRICT LEVEL

NOTE: School District identity is not required.
CODE: ______________________ (for research purposes).

INSTRUCTIONS

1. Please complete all five sections and the questionnaire and return by 1984 10 31.
2. Use "best-estimate" where precise information is not available.
3. Information requested is for the 1983-84 school year.
4. Return survey and questionnaire in enclosed addressed and postage-paid envelope to:

Kirk Salloum
c/o Graduate Programs
Faculty of Education
Simon Fraser University
Burnaby, B. C.
V5A 1S6

SECTION A - DEMOGRAPHIC DATA FOR 1983/84.

1. What was your district's student enrolment (K-12; full-time equivalent) as of June 28, 1984?

Total ____________

2. What was the total population of your school district in 1984? (Include all communities and their members and round off figure to the nearest hundred.)

Total ____________

SECTION B - PRIVATE FUNDING FOR 1983/84.

Check "YES" OR "NO" to the following questions and make "COMMENTS".

1. Does your district have a Charitable Donation Number so donations or the like, are taxed exempted by donors? (That is to say, is your district registered as a Charity Association and/or Canadian Athletic Association?)

YES __ NO __

2. Is a "charitable foundation" established in your district?

YES ___ NO ___

Comment: (Why was a foundation established? Has it functioned to your district's satisfaction? Why or why not?)

3. If you answered "NO" to question #2, then are there plans to establish a foundation in your district?

YES ___ NO ___

Comment: (Why or why not?) ______

4. State the total dollar amount (include the dollar amount of non-monetary items) collected by and/or given to your district from various sources. (Include, for example, donations, funds for scholarships, "gifts", grants for projects, et cetera. Include only private funds, not government.

LINE 1 $ ______

SECTION C - SOURCES OF PRIVATE FUNDS FOR 1983/84 IN PERCENT

1. Based upon the total dollar amount in SECTION B, #4, LINE 1, provide a percentage breakdown indicating the sources of the private funds in each of the following categories:

A. Foundations (e.g. Vancouver Foundation) ______%
B. Corporations ______%
C. Private Citizens ______%
D. Small Businesses ______%
E. Trust Funds ______%
F. Others: (Please Specify)
______ ______%

G. ____________ __________%

H. ____________ __________%

I. ____________ __________%

Total 100 %

SECTION D - ALLOCATION OF PRIVATE FUNDS FOR 1983/84 IN PERCENT.

1. Based upon the total dollar amount in SECTION B, #4, LINE 1, provide a percentage breakdown of expenditures in each of the following categories.

A. Curricular Programs __________%

B. Extra-Curricular Programs __________%

C. Scholarships __________%

D. Special Projects not related to curricular programs or extra-curricular programs. __________%

(Please specify some of these special projects:)

____

____

____

____

E. Donations made to charity __________%

F. Others: (Please specify)

____________________ __________%

G. ____________________ __________%

H. ____________________ __________%

I. ____________________ __________%

J. Surplus __________%

Total 100 %

2. Please comment on what is done with any surplus.

____

____

____

SECTION E - COMMENTS

Please make any comments regarding this survey and give any further information which may aid in this study. (For example, enclose policies regarding scholarships, trust funds, fund raising, and gifts or donations to schools.)

END OF SURVEY. PLEASE DO THE
QUESTIONNAIRE.
THANK YOU FOR YOUR ASSISTANCE.

APPENDIX E

THE QUESTIONNAIRE

PRINCIPAL AND SUPERINTENDENT QUESTIONNAIRE

Re: Private Funding for Public Education.

I. Please indicate your position by checking one of the following:

__ SUPERINTENDENT __ PRINCIPAL

II. Please respond to the questions below by being as specific as possible.

1. What benefits and disadvantages do you perceive with school districts being involved in raising or receiving money from private funding sources?

2. What benefits and disadvantages do you perceive with schools involved in raising or receiving money from private funding sources?

3. Express your view on having a "user-fee" or a "service charge" in the public education system; for example, student fees.

END OF QUESTIONNAIRE.
THANK YOU FOR YOUR ASSISTANCE.

APPENDIX F

CORRESPONDENCE

Kirk Salloum
c/o Graduate Programs
Faculty of Education
Simon Fraser University
Burnaby, B. C.
V5A 1S6

Dear

I am conducting a research study on private funding in the B. C. public education system; for example, donations, gifts, student fees, and monies raised from fund raising activities. This study will use surveys and questionnaires to gather information from a selected number of school districts and schools. The purpose of the surveys is to collect data which will aid in a general assessment of private funding in the B. C. public education system. The intention of the questionnaire will be to elicit general responses regarding the issue of "user-fees" in public education and the issue of soliciting money for public relations.

I am a student in the Administrative Leadership Program, Faculty of Education, at Simon Fraser University and as part of the requirements for my Master's degree I plan to do this study. The study has the approval of Dr. Norman Robinson, Faculty of Education. Should you wish to ask him any questions, he may be reached at the university at 291-4165 or at his home at 325-4964.

I am writing to ask you for your cooperation in completing the questionnaire and would like you, or an officer you designate, to complete the District Level Survey and return the material to me in the enclosed postage-paid envelope by October 31, 1984. As well, I am asking for the cooperation of your school principals, as indicated on the enclosed packages, in completing the questionnaires and School Level Surveys. I further request your assistance by asking you to

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see that the school principals receive the appropriate packages so that they each may respond to a questionnaire and a survey. They should return the material to me in the enclosed postage-paid envelope by October 31, 1984. In return for your district's cooperation I will send to you, as soon as possible, a summary of the survey and questionnaire results collected from this study.

All information given will be held in the strictest confidence and will be commented on by school and district types. Individual people, schools and districts will not be named. Therefore, school and district identity is not required and the code appearing on the surveys is for research purposes.

I recognize that school and district level financial and accounting systems vary. Therefore, the surveys have been designed in a format of commonly accepted categories. Further, I am requesting that the information be provided from the 1983/84 year. This should help to alleviate problems with guess-work in that data from this school year should be readily available. Should difficulties be encountered use judgements as to the "best estimate" of the figures requested.

If you decide not to participate in this study please return all material to me as soon as possible. If you have any questions please contact me at the above address or phone me at 872-4939 or 876-4649 (messages).

Thank you for your cooperation and assistance.

I look forward to sending you a summary of this study.

Yours sincerely,

Kirk Salloum
Graduate Student

Study approved by,

Dr. Norman Robinson
Professor of Educational
Administration

Kirk Salloum
c/o Graduate Programs
Faculty of Education
Simon Fraser University
Burnaby, B.C.
V5A 1S6

Dear

Re: Study on Private Funding for Public Education**

Recently, I took the liberty of asking the superintendent of your school district to participate in my study and to distribute surveys and postage-paid envelopes to a selected number of schools in your district. I sincerely appreciate your district's cooperation in my study. Unfortunately, I have not received a completed survey from you.

This study is of the utmost importance to the field of educational administration, particularly in today's financial environment in which districts and schools must operate. It is anticipated that the results of this study will greatly enhance our knowledge as to the functions and dysfunctions of private funding for public secondary and elementary education.

It is vital that I receive the survey from you for schools have NOT been randomly choosen, but have been selected on the basis of grade level, student enrolment, and geographic location. Hence, if I do not receive your completed survey it may be extremely difficult to find another school with the same characteristics in the time required to complete my study. Therefore, I urgently need to have you complete the survey to the best of your knowledge.

All information given will be held in the strictest confidence according to the University Ethics Review Committee and will be commented on by school and district types. Individual people, schools, and districts will not be named. Therefore, school and district identity is not required and the code appearing on the survey is for research purposes.

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In return for your participation and the district's cooperation, a summary report will be forwarded to your district office as soon as the study's results have been tallied.

I have enclosed a copy of the survey in case the original has been misplaced.

Thank you for you cooperation and assistance. I anxiously await your response.

Yours sincerely,

Kirk Salloum
Graduate Student

Study approved by,

Dr. Norman Robinson
Professor of Educational
Administration

**Financial support for this study was provided through a grant from the Educational Research Institute of B.C.

SFU
SIMON FRASER UNIVERSITY, BURNABY, B.C. CANADA

Kirk Salloum
c/o Graduate Programs
Faculty of Education
Simon Fraser University
Burnaby, B.C.
V5A 1S6

Dear

Re: Study on Private Funding for Public Education**

Recently, I took the liberty of sending you a letter asking for your cooperation, and the cooperation of a selected number of principals in your district, in completing surveys for my study on private funding for public education. Furthermore, I asked your assistance in distributing packages of surveys and postage-paid envelopes to the appropriate schools. Unfortunately, I have not received any of the completed surveys from the selected schools or your office.

This study is of the utmost importance to the field of educational administration, particularly in today's financial environment in which districts and schools must operate. It is anticipated that the results of this study will greatly enhance our knowledge as to the functions and dysfunctions of private funding for public secondary and elementary education.

It is vital that I know if your school district and schools will participate in this study for districts and schools have NOT been randomly selected. Therefore I must have a high level of respondents, and for research purposes only, knowledge of the non-respondents. If you have already decided to participate in this study, please pass on to the principals that I anxiously await their completed surveys. If you have not yet distributed the packages to the appropriate schools, may I suggest that you do so immediately, for the completion date is October 31, 1984. If you have decided not to participate in this study please return all materials to me. I sincerely hope you decide to participate in this study because of its potential value to

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education. Remember, in return for your district's cooperation you will receive a summary of the provincial results.I have enclosed a copy of the district level survey in case the original copy I sent to you has been misplaced.

Thank you for your cooperation and assistance. I anxiously await your response.

Yours truly,

Kirk Salloum
Graduate Student

Study approved by,

Dr. Norman Robinson
Professor of Educational
Administration

**Financial support for this study was provided through a grant from the Educational Research Institute of B.C.

Kirk Salloum
286 West 21st Avenue
Vancouver, B.C.
V5Y 2E5

Dear

Re: Study on Private Funding for Public Education

I am sending you this letter to acknowledge receipt of your returned survey. I also wish to thank you for your time and cooperation.

When the survey results have been tallied, I will be forwarding a Summary Report to your District Office. Financial support for this study was provided through a grant from the Educational Research Institute of B.C. and a copy of my study will be on file with their office in the Fall of 1985 under the title "Private Funding in the B.C. Public Educational System".

If you wish further information on this topic or study, please contact me at the above address or phone me at 872-4939 or at 876-4649 (messages).

Yours truly,

Kirk Salloum
Graduate Student
Faculty of Education
Simon Fraser University

Study approved by,

Dr. Norman Robinson
Professor of Educational
Administration

SIMON FRASER UNIVERSITY BURNABY B.C. [illegible]

Kirk Salloum
286 West 21st Avenue
Vancouver, B.C.
V5Y 2E5
Ph: 872-4939 or
876-4649 (messages)

Dear

Re: Summary Report on Private Funding for Public Education

I am sending this letter to thank you for your cooperation and assistance with my study on private funding for public education. Enclosed, as promised in the Fall, is a summary report of the study's results.

The study was made possible with the cooperation of all the educators who completed the surveys. I hope you find the results beneficial. I anticipate the results will be of interest to teachers, school communities, and educational administrators. I am further requesting your assistance in seeing that photocopies of the summary report are made available to schools in your district; especially those schools that participated in the study.

This study was financially supported, in part, through a grant from the Educational Research Institute of B.C. If you wish an analysis and discussion of this study, a copy of my thesis will be on file with ERIBC (701 - 601 West Broadway, Vancouver, B.C., V5Z 4C2) in the Fall of 1985.

If you wish further information on this topic or study, please do not hesitate to contact me at the above address or phone numbers. For your information, you will find an article relating to my research in the January 1985 issue of *the B.C. Teacher* (BCTF) magazine.

.../2

Again, thank you for your cooperation and assistance. I am indebted to your professionalism.

Yours sincerely,

Kirk Salloum
Graduate Student
Faculty of Education, S.F.U.

Study approved by,

Dr. Norman Robinson
Professor of Educational
Administration

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